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Research News for the U.S. Travel Industry

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TRAVEL PRINTOUT

US Travel Data Center

October 1990 **Volume 19, Number 10**

Industry Shows Concern, Optimism at Forum

Travel industry experts share the consumer's concern over the future of the economy, but they are still optimistic that the industry will endure any downturn and will continue to grow in 1991, delegates were told at the U.S. Travel Data Center's 1991 Travel Outlook Forum in Pittsburgh, Pennsylvania on October 16.

Travel industry experts representing all major segments of the industry gathered at the sixteenth annual forum, co-sponsored by the Travel and Tourism Research Association, to project what the future holds for the travel industry.

Forum speakers cautioned listeners about the many challenges in the 1990s, such as a downshifting economy, competition in the global travel marketplace and further governmental regulations.

Suzanne Cook, executive director of the Data Center, said overall domestic travel in the first seven months of 1990 has increased 3 percent, but noted that travel has been relatively flat since May. In addition, there has been nearly a 4 percent increase in vacation person-trips thus far in 1990. (A person-trip is one person traveling 100 miles or more away from home).

There is a 60 to 65 percent probability of recession in 1991, according to Stuart Hoffman, senior vice president and chief economist for the Pittsburgh National Bank. Mr. Hoffman echoed the other speakers' concern about the economy. He warned that productivity gains and the oil price situation are issues that will affect the economy in 1991 and beyond.

The weakening of the U.S. dollar was a major, positive influence on international travel to the United States in 1990 and will continue to play a role in 1991. Harvey Shields, deputy director of the Office of Research of the United States Travel and Tourism Administration, projected that international travel to the United States in 1990 will increase 11 percent - with a record number of more than 40 million visitors - and will increase an additional 9 percent in 1991.

Europeans will take more than 960 million trips in 1990, a nearly 2 percent increase over 1989, according to Rolf Freitag, executive director of the European Travel Data Center. France was the number one destination of European travelers in 1989, but Germany is experiencing the greatest growth as a destination this year.

Travel Weekly Publisher William Scott, updated forum attendees on the current status and future of the U.S. travel agencies. While growth in the number of traditional travel agencies has slowed in recent years, there has been rapid growth in Satellite Ticket Printers (STPs). Together, Mr. Scott anticipates that there will be 7 percent more airline approved agency locations by the end of 1990 compared to last year.

Several speakers expressed concern about the increase in fuel costs. David Swierenga, assistant vice president, Air Transport Association, alerted forum delegates that increased fuel costs will negatively affect the airline industry, causing prices to increase dramatically. Mr. Swierenga projected that there will be a fairly mild recession and that the airline industry would show a 3 to 4 percent decrease in volume in 1991. Mr. Swierenga repeated earlier speakers' projections that international travel would continue to prosper.

The hotel sector, according to Randy Smith, president of Smith Travel Research, will also see an increase in prices. Room rates will increase more than 3 percent in 1991. Occupancy rates in 1991 will average 65 percent, increasing close to 1 percent over 1990. Real hotel/motel sales are projected to rise 3.8 percent in 1990 and 2.5 percent in 1991.

Over the first six months of this year, business trips have increased 2.5 percent and the number of business travelers rose 3.5 percent, said Hank Brandt, marketing and research manager of Official Airline Guides. Mr. Brandt told the delegates that business travelers are consolidating trips and staying on the road a little longer in an effort to minimize the cost of the trips they do take.
(continued on page 3)

INSIDE: Data Center releases *free* publication guide

Lodging Costs Lead to Travel Price Decrease

For the first time since February, the cost of travel in the United States decreased, dropping nearly 1 percent in September. The decrease was largely due to lodging costs, which dropped more than 6 percent in September, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. dropped to 139.6 (1982 - 84 = 100) during September.

For comparison, the overall cost of goods and services Americans purchased as measured by the Consumer Price Index (CPI) rose 0.8 percent to 132.7.

Travel Price Index and Components

September 1990 TPI Component	Monthly % Change August 1990 to Sept. 1990	Annual % Change Sept. 1989 to Sept. 1990
Transportation	5.7	20.5
Airline Fares	1.9	13.5
Other Intercity Trans.	1.9	5.2
Intracity Public Trans.	0.1	6.1
Motor Fuel	8.5	26.1
Lodging	-6.6	14.7
Food and Beverages		
Away From Home	0.2	4.5
Entertainment	1.8	6.9
TRAVEL PRICE INDEX	-0.8	10.8
CONSUMER PRICE INDEX	0.8	6.2

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

For the second straight month, motor fuel showed the largest increase in the month of September, jumping 8.5 percent, due in large part to the Middle East crisis. Motor fuel also showed the highest increase over the last 12 months, increasing more than 26 percent.

Overall transportation costs also showed a significant increase in September, increasing nearly 6 percent and jumping more than 20 percent over the last 12 months. Airline fares, intercity transportation, intracity public transportation and entertainment costs showed slight increases.

Over the past 12 month period, the TPI rose 10.8 percent, influenced by a 26 percent hike in motor fuel and a 20 percent jump in transportation. The CPI showed a more than 6 percent increase over the past 12 months.

July Travel Inches Forward

Travel this July increased slightly, showing a 0.5 percent increase over last July with more than 153 million person-trips taken by U.S. residents, according to the Data Center's latest National Travel Survey (NTS) results. (A person-trip measures each person traveling 100 miles or more away from home.)

Business and pleasure travel showed substantial increases in July. Pleasure travel increased more than 4 percent over last July with more than 122 million person-trips. Although, pleasure person-trips increased the average round-trip distance decreased. The distance for pleasure travel dropped from 850 round-trip miles last July to 750 miles this July.

Business travel also showed an increase of more than 4 percent. The duration of the average business trip increased from 3 nights last July to more than 5 nights this past July.

Vacation travel dropped slightly for the second consecutive month, decreasing nearly 3 percent in July. The average duration of a vacation trip also decreased in July, decreasing from 5.1 nights last July to 4.8 nights in 1990.

Automobile travel jumped more than 1 percent with more than 122 million person-trips. Thirty-five percent of travelers using cars as the mode of transportation lived in the Midwest, and most of these travelers tended to stay within the Midwest during the trip.

Air travel showed a decrease in July, with more than 24 million person-trips, dropping nearly 8 percent. The average round-trip distance for air travel dropped from 2150 miles last July to 1950 miles this year, resulting in the decrease in domestic air passenger miles reported by the Air Transport Association.

The average party size remained stable, with an average of 2 persons per trip in July. Pleasure and vacation travel both showed slight decreases in the average party size this past July.

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Family vacation travel continues to be a large share of total vacation travel in the United States, said Peter Mason, travel classification manager at *Better Homes & Gardens.* In 1989, there were a total of 75.9 million travelers who took family vacations and the largest segment of those were taken by two or more adults without children.

The summer months are the most popular season for family vacation travel. More than 63 percent of all family vacation person-trips in 1989 were taken in the summer.

According to the National Restaurant Association, the foodservice industry will exceed $241 billion in 1990 and equal nearly 5 percent of the U.S. Gross National Product. There are currently 8 million people employed by the industry, and the number is expected to reach 11 million by the year 2000.

The bed and breakfast industry is looking forward to significant growth and change in the 1990s. The industry has grown from a mere 500 or so establishments, mostly clustered in New England, to 20,000 spread throughout the entire country.

The complete proceedings of the sixteenth annual Travel Outlook Forum can be purchased for $125 by contacting the Data Center at (202) 293-1040. *(Data Center members will be receiving a complimentary copy).*

Visitor Volume at National Parks

Region	AUGUST 1990 visits	% Change from AUGUST 1989	Year to Date % Change 1990/89*
NEW ENGLAND	3,006,600	5.2%	1.1%
MIDDLE ATLANTIC	3,555,862	-17.6	-17.1
SOUTH ATLANTIC	9,426,654	-12.0	-10.0
EAST SOUTH CENT.	2,048,258	-17.0	-20.4
EAST NORTH CENT.	1,135,585	1.1	-1.1
WEST NORTH CENT.	2,055,343	0.6	-0.1
WEST SOUTH CENT.	981,198	-7.3	-5.5
MOUNTAIN	7,332,906	2.4	3.4
PACIFIC	6,302,673	-11.5	-8.0
TOTAL	35,845,079	-7.7	-7.7

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: New England: Conn., Maine, Mass., N.H., R.I., Vermont. Middle Atlantic: N.J., N.Y., Penn. S. Atlantic: Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. East South Central: Ala., Ky., Miss., Tenn. East North Central: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. West South Central: Ark., La., Okla., Texas. Mountain: Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. Pacific: Alaska, Calif., Hawaii, Ore., Wash.

Data Center Releases Free Publication Guide

In an effort to better inform the travel industry, the Data Center now provides a free listing of all available publications.

This in-depth guide lists all Data Center publications, in addition to reports from the United States Travel and Tourism Administration (USTTA) and the reports from the Discover America 2000 series.

A recent agreement with USTTA enables the Data Center to market such reports as the *In-Flight Surveys* and the *Pleasure Travel Market to North America.*

The publication guide also includes the Discover America 2000 Marketing Research Series. The series includes *The Implications of America's Changing Demographics and Attitudes on the U.S. Travel Industry* and a newly released report entitled *Discover America: The Mature Market.*

If you would like a complete and free listing of domestic and international travel research, contact the Data Center at (202) 293-1040.

Schedule Set for Fifth Annual Travel Review Conference

The schedule of events for the 1991 Travel Review Conference has been released. The fifth annual conference, to be held on Monday, February 4, 1991 at the Omni Shoreham Hotel in Washington, D.C., will review important issues affecting the travel industry in 1990, discuss national trends in U.S. domestic travel and recap international travel.

The Conference, jointly sponsored by the Data Center, U.S. Travel and Tourism Administration (USTTA) and Travel and Tourism Research Association (TTRA), will feature a review of 1990 travel statistics, marketing strategies and other pertinent data to assist travel marketing and research managerial decision-making.

Highlights will include a review of 1990 domestic travel by Suzanne Cook, executive director at the Data Center. Other travel industry experts will discuss 1990 trends in transportation, eco-tourism, the effects of the Middle East crisis and accommodations.

For further information on the fifth annual Travel Review Conference, contact Vernon Azucenas at (202) 293-1040.

Current Travel Indicators - 1990

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	August	$ 5,543	million	3.9	6.2	7.9
Eating and Drinking Places(2)	August	$15,135	million	-0.7	4.2	5.0
Gasoline Service Stations(2)	August	$10,674	million	6.4	11.7	5.4
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	August	63.1	percent	1.5	-0.6	1.4
Real Demand for Commercial Lodging(4)	August	69.9	million	4.2	3.5	4.2
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	August	32.3	billion	6.0	1.4	2.9
Int'l Revenue Passenger-Miles	August	13.1	billion	5.5	16.3	17.1
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	July	50.3	billion	5.3	2.4	3.9
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	August	607.0	million	3.0	4.6	3.3
Travel Price Index (1982 - 84 = 100) (8)	August	140.7		2.3	9.1	6.5
U.S. Resident Travel						
Total Person-trips(9)	July	153.1	million	15.3	0.5	3.1
Vacation Person-trips(9)	July	115.2	million	23.2	-2.6	3.4
Total Person-nights(10)	July	673.6	million	23.8	N/A	N/A
Vacation Person-nights(10)	July	553.0	million	28.6	N/A	N/A
Public Use of National Parks (11)						
Visits	August	35,845,079		-5.9	-7.7	-7.7
Overnight Stays	August	3,420,739		1.6	3.4	1.9
Foreign Arrivals to the U.S.						
From Overseas(12)	June	1,381,505		13.0	11.8	8.8
From Canada(13)	August	2,443,308		6.3	16.0	12.7
From Mexico(12)	June	110,653		25.3	18.7	10.5
U.S. Citizen Departures						
To Overseas(12)	May	1,427,300		15.9	11.1	10.5
To Canada(13)	August	2,206,780		5.2	3.8	1.6
Domestic Demand for Gasoline						
Barrels/Day(14)	August	7,757	thousands	4.6	0.1	-0.7

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1988 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

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US Travel Data Center

November 1990 Volume 19, Number 11

Travel Industry Endures Recessionary Periods

There is growing concern over the current condition and future of the U.S. economy and how the travel industry will endure if an economic downturn does occur.

To get a better perspective on how the industry fared and how consumers' behavior changed during past economic recessions, the Data Center has completed a brief historical perspective on our last recession and its aftermath.

The 1981-82 recession did have an affect on the volume of travel. According to the National Travel Survey, the number of person-trips decreased 7 percent in 1982 and did not begin to show an increase until 1985. (A person-trip is one person traveling 100 miles or more away from home).

Many have suggested that the economy is already in a recession. If the volume of travel is any indication, the economy has not had a major affect on the travel industry. In fact, through the first eight months of 1990 total travel has increased more than 3 percent over the previous year. (See page 2).

One aspect of travel that was affected by the 1981-82 recession was consumers' travel habits. Travelers combined vacation trips with business trips, joined short trips into a long one and doubtless explored other ways to continue an activity that has become an intregal part of their lifestyle.

In spite of the change in consumers' habits, hotels and motels maintained relative success. One of the reasons for the success was travelers' combination of business and vacation trips and their higher propensity to use paid accommodations on longer distance trips.

The percentage of travelers using hotels and motels remained relatively stable between 1982-85, while the supply of rooms continued to grow at an annual rate of 6 percent.

Vacation travel recovered more quickly than other types of travel after the 1981-82 recession . After showing a slight decrease in 1983, vacation travel jumped more than 7 percent in 1984.

During this period, travelers consolidated their vacation travel of several short trips into fewer longer ones and vacation trips became longer in duration and distance during the recession. Round-trip distance for vacation travel, for example, rose from 800 miles in 1981 to 900 miles in 1983 and the average duration rose from 5.6 nights to 6.2 nights.

The share of weekend vacation trips also fell from 48 percent in 1981 to 44 percent in 1983.

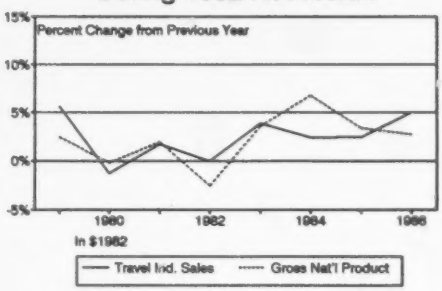
Vacation travel for families with an income under $20,000 dropped 6 percent between 1981-83, while families with an income of $30,000 plus increased 5 percent.

There are some indications that gasoline shortages and rising prices may affect the travel industry more than economic recessions. According to the Data Center's *1989-90 Economic Review of Travel in America*, real travel industry receipts, after adjusting for inflation, did not decline during the last recession but did fall when petroleum prices soared in 1980. (See graph).

Even though real travel sales did not decrease during the last recession, the industry was slower to recover than the overall economy as consumers chose to satisfy their pent-up demand for durables at the expense of maintaining previous levels of vacation travel in the years following.

(Continued on page 3)

Real Travel Sales Outpaced GNP During 1982 Recession



INSIDE: *Data Center Insider* releases schedule for 1990 Travel Review Conference

Motor Fuel Prices Lead to Travel Price Increase

After decreasing in September, the cost of travel in the United States increased nearly 1 percent in October. The increase was largely due to motor fuel prices, which jumped more than 6 percent in October, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. increased to 140.7 (1982 - 84 = 100) during October.

For comparison, the overall cost of goods and services Americans purchased as measured by the Consumer Price Index (CPI) rose 0.6 percent to 133.5.

Travel Price Index and Components

October 1990 TPI Component	Monthly % Change Sept. 1990 to Oct. 1990	Annual % Change Oct. 1989 to Oct. 1990
Transportation	4.6	25.7
Airline Fares	[illegible]	15.7
Other Intercity Trans.	-0.3	6.0
Intracity Public Trans.	0.3	6.4
Motor Fuel	6.2	33.7
Lodging	-1.0	13.5
Food and Beverages Away From Home	0.3	4.6
Entertainment	-0.7	5.9
TRAVEL PRICE INDEX	0.8	11.4
CONSUMER PRICE INDEX	0.6	6.3

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

For the third straight month, motor fuel showed the largest increase in the month of October, due in large part to the Middle East crisis. Motor fuel also showed the highest increase over the last 12 months, increasing nearly 34 percent.

Overall transportation costs also showed a significant increase in October, increasing nearly 5 percent and jumping more than 25 percent over the last 12 months. Airline fares, intracity public transportation and intercity transportation costs showed increases over the last 12 months.

Over the past 12 month period, the TPI rose 11.4 percent, influenced by the increase in motor fuel and transportation. The CPI showed a more than 6 percent increase over the past 12 months.

August Travel Jumps 4 Percent

Even in the midst of the Middle East crisis, consumers are unwilling to forgo travel. Travel this August increased 4 percent over last August with more than 151 million person-trips taken by U.S. residents, according to the Data Center's latest National Travel Survey (NTS) results. (A person-trip measures each person traveling 100 miles or more away from home.)

After dropping slightly for the past two months, vacation travel increased more than 8 percent this past August, with nearly 118 million person-trips. The average duration of a vacation trip remained the same, 5.2 nights. The average party size of a vacation trip drop slightly from 2.2 last August to 2.1 this August.

Pleasure travel showed the highest increase in August, and its average round-trip distance also increased. The distance for pleasure travel increased from 880 round-trip miles last August to 900 miles this August.

Automobile travel jumped more than 6 percent with more than 121 million person-trips. Travelers who used the automobile as a mode of transportation traveled shorter distances, dropping from 670 round-trip miles last August to 640 this August.

Air travel showed a decrease in August, with more than 24 million person-trips, dropping nearly 1 percent. The average round-trip distance for air travel increased from 2150 miles last August to 2230 miles this year.

The average party size remained stable, with an average of less than 2 persons per trip in August. Pleasure and vacation travel both showed slight decreases in the average party size this past August.

The Great Lakes region hosted more than 20 million travelers in August, posting another substantial gain. The Midwest and West regions posted increases of 14.1 and 0.1 percent year-to-date, respectively. The Northwest and Southeast experienced declines in traveler volumes for the year-to-date.

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(Continued from page 1).

Despite sluggish growth in receipts during the last recession, industry employment outperformed overall employment in creating new jobs during the 1981-85 period, according to the *Economic Review*.

Employment in the travel industry has risen every year since 1958 despite five economic recessions. During the 1981-82 recession, the travel industry showed an increase of 72 thousand jobs. In comparison, there was a decline of 2.4 million jobs in the overall economy,

Travel appears to be a counter-recessionary force in the economy, helping to offset employment losses in other industries and moderating the recession's damaging effects on jobs and income.

Despite the recession's end in November 1982, total U.S. employment continued to decline for several months. Travel industry employment, on the other hand, produced healthy increases throughout the year. Since 1982, travel industry employment has grown 55 percent faster than jobs in the overall economy.

The 1989-90 Economic Review of Travel in the United States can be purchased for $60 by contacting the Data Center at (202) 293-1040.

Discoveries...

Ogilvy & Mather has released its 1990 anniversary edition of *Trends in Travel and Tourism Advertising Expenditures.*

Consumer media advertising by travel and tourism companies has increased from $100 million in 1964 to $1.19 billion in 1989, according to the report.

The study reports on advertising in the U.S. media by airlines, domestic and foreign destinations and cruise lines. The report covers the period of 1985 through 1989 and details various travel segments and analyzes leading advertisers.

Reports are available for $75. Send orders to Ogilvy & Mather, c/o Edward Berrol, 309 West 49th Street, New York, N.Y. 10019. For additional information on the report call (212) 237-4000.

"Discoveries" is a **Travel Printout** feature designed to give added exposure to all types of travel-related research.

To submit your company's travel research projects, send a brief description of the report, including the price, address and contact name, to Scott Dring, U.S. Travel Data Center, 1133 21st Street, Washington, D.C. 20036.

Travelers Combine Business, Vacation Travel

Nearly 24 percent of all business travelers included some type of vacation travel on an average business trip in 1989, according to the Data Center's *1989 Survey of Business Travelers*.

On nearly half of the business trips that included vacation, the vacation portions accounted for half of the time spent. Business travelers combining vacation with business travel were more likely to be women who have incomes under $30,000 per year.

More than one-third of all business travelers who combined business and vacation travel were self-employed. Fifty-one percent of all combined business and vacation trips included other household members and more than half used their own automobile.

The report, sponsored by the Reed Travel Group, said that 34 million U.S. adults took a total of 170 million business trips in 1989, a nine percent increase from 156 million taken the previous year.

The Survey of Business Travelers has tracked the growth and characteristics of U.S. business travelers and the trips they take on a monthly basis since 1984. It includes an overview of business travel, a profile of business travelers, characteristics of business trips, purpose of business trips, modes of transportation, accommodations and profiles of a number of business traveler segments.

The 1989 Survey of Business Travelers is available for $85 by contacting the Data Center at (202) 293-1040.

Visitor Volume at National Parks

Region	SEPT 1990 Visits	% Change from SEPT 1989	Year to Date % Change 1990/89*
NEW ENGLAND	1,790,786	-0.8%	0.9%
MIDDLE ATLANTIC	2,536,757	-15.3	-17.0
SOUTH ATLANTIC	7,702,627	-2.0	-9.2
EAST SOUTH CENT.	1,623,707	-16.9	-20.2
EAST NORTH CENT.	622,095	2.7	-0.1
WEST NORTH CENT.	977,549	-0.4	0.0
WEST SOUTH CENT.	720,529	-14.2	-7.1
MOUNTAIN	4,819,409	2.4	3.3
PACIFIC	4,792,412	-16.9	-20.2
TOTAL	25,585,871	-5.1	-7.4

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: New England: Conn., Maine, Mass., N.H., R.I., Vermont. Middle Atlantic: N.J., N.Y., Penn. S. Atlantic: Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. East South Central: Ala., Ky., Miss., Tenn. East North Central: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. West South Central: Ark., La., Okla., Texas. Mountain: Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. Pacific: Alaska, Calif., Hawaii, Ore., Wash.

Current Travel Indicators - 1990

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Sept	$5,154	million	-7.0	4.0	7.5
Eating and Drinking Places(2)	Sept	$15,486	million	1.0	6.2	5.4
Gasoline Service Stations(2)	Sept	$11,344	million	4.9	18.0	7.1
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Sept	63.7	percent	1.0	-2.5	1.0
Real Demand for Commercial Lodging(4)	Sept	63.4	million	-9.2	1.3	3.9
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Sept	25.2	billion	-22.2	2.4	2.8
Int'l Revenue Passenger-Miles	Sept	10.5	billion	-20.1	14.5	16.8
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	August	51.0	billion	-13.0	1.5	3.6
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Sept	461.3	million	-24.0	2.9	3.2
Travel Price Index (1982 - 84 = 100) (8)	Sept	139.6		-0.8	10.8	6.9
U.S. Resident Travel						
Total Person-trips(9)	Aug	151.1	million	-1.3	4.0	3.3
Vacation Person-trips(9)	Aug	117.7	million	2.2	8.4	4.3
Total Person-nights(10)	Aug	710.2	million	5.4	N/A	N/A
Vacation Person-nights(10)	Aug	612.0	million	10.7	N/A	N/A
Public Use of National Parks (11)						
Visits	Sept	25,585,871		-28.6	-5.1	-7.4
Overnight Stays	Sept	2,048,587		-40.1	-0.5	1.6
Foreign Arrivals to the U.S.						
From Overseas(12)	July	N/A		N/A	N/A	N/A
From Canada(13)	Sept	1,549,863		-36.6	17.1	13.2
From Mexico(12)	July	N/A		N/A	N/A	N/A
U.S. Citizen Departures						
To Overseas(12)	June	N/A		N/A	N/A	N/A
To Canada(13)	Sept	1,261,859		-42.8	-3.4	1.0
Domestic Demand for Gasoline						
Barrels/Day(14)	Sept	7,206	thousand	-7.3	-6.6	-1.0

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1988 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

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November 1990
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Research News for the U.S. Travel Industry

R9375-1

Research News for the U.S. Travel Industry

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TRAVEL PRINTOUT

US Travel Data Center

December 1990 Volume 19, Number 12

Summer Travel Shows Increase in 1990

Despite concerns that summer travel would be down this year due to economic conditions and the Middle East crisis, overall summer travel increased more than 2 percent in 1990.

During the months of June, July and August, there were a total of 437 million person-trips, according to the Data Center's National Travel Survey. (A person-trip is one person traveling 100 miles or more away from home).

"It was not a banner year for summer travel in terms of growth, but the numbers show that it was not as bad as many feared," said Suzanne Cook, executive director at the Data Center.

Vacation travel remained relatively stable this past summer, but still maintained the high level of volume reached last summer, increasing 1.5 percent with more than 326 million person-trips. The increase in 1990 summer travel was mainly due to the record number of vacation trips in August, a more than 8 percent increase over the previous August.

One reason for the increase in August could have been the invasion of Kuwait earlier in the month. "The Middle East crisis may have induced people to travel more in August, in anticipation that travel prices would skyrocket," according to Elizabeth Stewart, manager of survey research at the Data Center.

According to the Data Center's survey, travel to the Midwest and Great Lakes showed substantial increases from the previous summer. More favorable prices and aggressive promotional campaigns could be reasons for the large increases in the Midwest and Great Lakes regions.

In fact, three out of the five states that make up the Great Lakes region rank in the top 20 highest state advertising budgets for 1989-90.

Travelers this summer again preferred auto travel as their mode of transportation. Auto person-trips increased 4 percent in 1990 with more than 353 million person-trips. Automobile trips were shorter in length this past summer. The average round-trip distance dropped from 630 round-trip miles last summer to 600 round-trip miles this past summer.

Air travel in terms of person-trips, on the other hand, showed a decrease of nearly 5 percent this past summer. One of the major reasons for this decline was the hike in airline fares this past summer.

Four-fifths of the summer 1990 person-trips were taken for pleasure purposes. Of these, 46 percent of the travelers stayed with friends/relatives, while 36 percent stayed in commercial lodgings.

The number of hotel-related person trips decreased nearly 3 percent this summer with 189 million person-trips.

Average round-trip distances during the summer 1990 were lower, overall, than those a year ago, while average trip duration decreased or stayed the same in almost every category. People traveling this summer went an average of 830 round-trip miles and spent, on the average, 4.4 nights away from home.

The average travel party size this summer dropped more than 4 percent. Even though travel by the 18-34 age group decreased more than 2 percent, they still traveled more than any other age group.

The National Travel Survey summer report, *Summer Travel Market Report*, will be available in January and can be purchased for $100. For additional information on the Summer Travel Report, contact Elizabeth Stewart at (202) 293-1040.

Don't Forget...

The Fifth Annual
Travel Review Conference
Omni Shoreham Hotel, Washington, D.C.
February 4, 1991

Rising Airline Fares Lead Travel Price Increase

Following a notable increase in October, the cost of travel in the United States rose 0.2 percent in November. The increase was largely due to a 3.6 percent jump in airline fares, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. increased to 141.3 (1982 - 84 = 100) during November.

For comparison, the overall cost of goods and services Americans purchased as measured by the Consumer Price Index (CPI) rose 0.2 percent to 133.8.

Travel Price Index and Components

November 1990 TPI Components	Monthly % Change Oct. 1990 to Nov. 1990	Annual % Change Nov. 1989 to Nov. 1990
Transportation	1.5	28.5
Airline Fares	3.6	18.6
Other Intercity Trans.	0.3	6.1
Intracity Public Trans.	0.3	7.5
Motor Fuel	0.1	36.5
Lodging	-0.5	14.2
Food and Beverages		
Away From Home	0.3	4.6
Entertainment	0.4	6.4
TRAVEL PRICE INDEX	0.4	12.1
CONSUMER PRICE INDEX	0.2	6.3

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

For the fourth consecutive month, motor fuel costs increased, bringing on a sharp rise in airline fares. Both of these price increases are due in large part to the Middle East crisis. Motor fuel also showed the highest increase over the last 12 months, increasing almost 37 percent over a year ago.

Overall transportation costs rose 1.5 percent in November, and jumped more than 28 percent over the last 12 months. While showing a slight decrease in November, the cost of lodging while out of town rose more than 14 percent over one year ago.

Over the past 12 months, the TPI rose 12.1 percent, influenced greatly by rising motor fuel costs. The CPI rose more than 6 percent over the same 12 month period.

Pleasure Travel Increases 6 Percent in September

Despite a troubled economy, overall travel grew more than 4 percent in September 1990 over last September with more than 116 million person-trips taken by U.S. residents, according to the Data Center's latest National Travel Survey (NTS) results. (A person-trip measures each person traveling 100 miles or more away from home.)

Analysts believe that the diminished fears of a fuel shortage aided in the growth of pleasure travel. Pleasure travel, which showed the highest increase for the second month in a row, jumped more than 6 percent over the previous September with 86 million person-trips.

Vacation travel increased more than 2 percent in September, after increasing 8 percent in August. The average duration of a vacation trip also increased from an average of 3.9 nights last September to 4.1 nights this September.

Even though pleasure travel showed the largest increase in September, Americans stayed closer to home, perhaps in an attempt to offset rising fuel costs. The average round-trip distance for pleasure travel decreased from 850 round-trip miles last September to 650 round-trip miles this year.

Automobile travel jumped 8 percent with nearly 93 million person-trips. Travelers who used the automobile as a mode of transportation traveled shorter distances, dropping from 630 round-trip miles last September to 520 round-trip miles this September.

The average party size remained stable, with an average of less than 2 persons per trip in September. Vacation travel showed a slight decrease in the average party size, while the average party size for pleasure travel remained stable this past September.

Regional travel remained consistent, as the Great Lakes, Midwest and West showed increases in September, while the Northeast and Southeast experienced declines in traveler volumes due largely to their troubled economies.

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel Industry Association of America, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C., 20036. (202) 293-1040.

Dr. Suzanne D. Cook, Executive Director
Scott M. Dring, Editor

TRAVEL PRINTOUT reports on Data Center projects, national travel research conducted by other organizations and trends in the U.S. Travel Industry. Subscriptions are $75 per year; Foreign countries, $80 per year, payable in U.S. funds. ISSN: 0744-6233.

Rockefeller to Speak at Forum

Senator John D. Rockefeller (D-WV) will be this year's keynote speaker at the fifth annual Travel Review Conference on February 4, 1991 at the Omni Shoreham Hotel in Washington, D.C.

Senator Rockefeller has been a strong advocate of tourism in the United States and currently serves as chairman of the Subcommittee on Foreign Commerce and Tourism. Elected to the Senate in 1984, Rockefeller has pushed numerous initiatives to bolster tourism in his home state of West Virginia.

Martin Shugrue, Jr., trustee at Eastern Airlines, will discuss the growth of the travel industry and in particular the status of the airline industry. Shugrue, former national chairman of the Travel Industry Association of America (TIA), in his distinguished career in the travel industry, has also served as Pan American's vice chairman and chief operating officer.

Suzanne Cook, executive director of the Data Center, will take a look at national trends in 1990 domestic travel and Harvey Shields, acting director, Office of Research at the United States Travel and Tourism Administration (USTTA), will review 1990 international inbound and outbound to and from the United States.

The conference is co-sponsored by the Data Center, USTTA and the Travel and Tourism Research Association (TTRA). Registration fees for USTDC, TTRA members and USTTA International Tourism Conference attendees is $180. Others can register for $200; students can register for $100.

For additional information or to register for the conference, contact Vernon Azucenas of the Data Center at (202) 293-1040.

Visitor Volume at National Parks

Region	OCT 1990 visits	% Change from OCT 1989	Year to Date % Change 1990/89*
NEW ENGLAND	1,625,078	6.0%	1.0%
MIDDLE ATLANTIC	2,510,001	-6.1	-16.4
SOUTH ATLANTIC	7,100,842	-1.4	-2.6
EAST SOUTH CENT.	1,771,319	-15.2	-19.7
EAST NORTH CENT.	441,132	-17.3	-1.6
WEST NORTH CENT.	538,536	-3.8	-0.1
WEST SOUTH CENT.	666,254	-17.0	-7.9
MOUNTAIN	2,853,090	-5.5	2.7
PACIFIC	3,586,380	-10.7	-9.1
TOTAL	21,092,632	-6.0	-5.8

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: New England: Conn., Maine, Mass., N.H., R.I., Vermont. Middle Atlantic: N.J., N.Y., Penn. S. Atlantic: Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. East South Central: Ala., Ky., Miss., Tenn. East North Central: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. West South Central: Ark., La., Okla., Texas. Mountain: Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. Pacific: Alaska, Calif., Hawaii, Ore., Wash.

Discoveries..

Expenditures in the meetings market have grown 236 percent from $11.8 billion in 1979 to $39.6 billion in 1989, according to the 1990 Meetings Market Study.

Corporate meeting attendance reached 58 million in 1989, a 23 percent increase over 1987. The study was prepared by *Meetings & Conventions Magazine*, which is published by Reed Travel Group.

The report measures the dimensions and tracks the changes in both corporate and association off-premises meetings. The report can be purchased for $200. Send orders to Mary Concorso at Reed Travel Group, 500 Plaza Drive, Secaucus, NJ 07096 or call (201) 902-1552.

To submit your company's travel research projects, send a brief description of the report, including the price, address, and contact name, to Scott Dring, U.S. Travel Data Center, 1133 21st Street, Washington, D.C. 20036.

Board of Trustees Elects Foster as 1991 Chairman

During its December 3 meeting in Memphis, the Data Center's Board of Trustees elected new members and officers for 1991. Jerry Foster, world-wide president of Travellers International in St. Louis, replaces Dr. John D. Hunt, who served two years as chairman.

Mr. Foster, who was previously president of Saga International Holidays, recently joined Travellers International, a land tour program for TWA getaway tour packages in Europe.

C. Reath Edwards, director of corporate marketing at Hershey Entertainment & Resort Co. will serve as the new treasurer.

Barbara Wickliffe, marketing research director of Best Western International replaces Jerry Foster as executive committee member.

Margaret Megee, director of the Tourism Division at the Texas Department of Commerce, and Sally Sussman, manager of public affairs, American Express Travel Related Services, are new trustees.

Officers remaining the same for 1991:

- Vice Chairman, Edward R. Book, president of the Travel Industry Association of America.
- Secretary, Dr. Charles R. Goeldner, professor of marketing, University of Colorado.

Current Travel Indicators - 1990

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Oct	$5,600	million	8.7	5.4	7.3
Eating and Drinking Places(2)	Oct	$15,290	million	-0.3	4.7	5.2
Gasoline Service Stations(2)	Oct	$11,998	million	3.2	23.7	9.4
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Oct	63.2	percent	-0.8	-1.9	0.7
Real Demand for Commercial Lodging(4)	Oct	67.5	million	6.4	1.5	3.6
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Oct	27.1	billion	7.8	1.3	2.7
	Nov	25.5	billion	-6.1	0.1	2.5
Int'l Revenue Passenger-Miles	Oct	9.4	billion	-10.3	12.2	16.3
	Nov	8.0	billion	-14.6	10.7	15.9
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Sept	44.6	billion	-12.6	2.1	3.7
	Oct	45.0	billion	1.0	0.6	3.4
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Oct	486.4	million	5.4	4.6	3.4
Travel Price Index (1982 - 84 = 100) (8)	Oct	140.7		0.8	11.4	7.4
U.S. Resident Travel						
Total Person-trips(9)	Sept	116.1	million	-23.2	4.3	3.4
Vacation Person-trips(9)	Sept	84.4	million	-28.3	2.4	4.1
Total Person-nights(10)	Sept	429.6	million	-39.5	5.6	6.9
Vacation Person-nights(10)	Sept	346.0	million	-43.5	7.2	6.0
Public Use of National Parks (11)						
Visits	Oct	21,092,632		-6.0	-5.8	-6.3
Overnight Stays	Oct	1,151,253		-43.8	-6.3	1.0
Foreign Arrivals to the U.S.						
From Overseas(12)	July	1,596,194		15.5	-4.7	5.9
	Aug	1,639,136		2.7	5.7	5.9
From Canada(13)	Oct	1,337,146		-13.7	9.6	12.9
From Mexico(12)	July	161,178		45.7	1.2	8.3
	Aug	156,784		-2.7	-5.3	5.6
U.S. Citizen Departures						
To Overseas(12)	June	1,748,100		22.5	10.1	9.4
	July	1,776,400		1.6	9.3	9.4
To Canada(13)	Oct	833,340		-34.0	2.4	1.1
Domestic Demand for Gasoline						
Barrels/Day(14)	Oct	7,034	thousands	2.0	-2.9	-1.7

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

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December 1990

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Research News for the U.S. Travel Industry

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TRAVEL PRINTOUT

US Travel Data Center

January 1991 Volume 20, Number 1

States Continue to Promote Travel

State governments plan to spend nearly $356 million for travel and tourism development and promotion in fiscal year 1990-91, a more than 5 percent increase from last year's total, according to the U.S. Travel Data Center's *1990-91 Survey of State Travel Offices.*

Thirty-five states posted travel budget increases for 1990-91. The average state travel office budget reached $7.1 million, up from $6.8 million last year.

The 18th annual report, which provides state travel office budgets by category, advertising, promotion and research programs, listed Illinois as having the highest projected state travel office budget in fiscal year 1990-91.

Illinois' projected state travel office budget will increase 45 percent over last year's budget, totaling nearly $32 million. In addition, its budget is $9.5 million more than the second highest state, Hawaii.

The growing importance of the travel industry on the U.S. economy is reflected in the dramatic increase of state travel budgets in the last 10 years. In 1980, the total of all 50 state travel office budgets reached $90 million. Now at nearly $356 million, this is, nearly a 400 percent increase.

Nevertheless, many states travel office budgets have felt the pinch of budget cuts, due in part to the softening of the economy. Four of the top ten budgets will decrease in 1990-91.

One state particularly affected by state budget costs was New York, whose projected travel office budget will decrease 27 percent. "With a more than $1.5 billion deficit, New York is technically bankrupt and the travel budget has suffered because of it," said Craig Wakefield, tourism marketing analyst at the New York Department of Economic Development.

Most states were able to weather the storm and continue to increase their budgets. Louisiana is one such state that drastically increased its travel budget, showing an 81 percent increase over the previous year. The increase was high enough to move Louisiana from 26 to 10 in the state travel office budget rankings (See list).

"The state legislature realized that travel and tourism can help diversify the Louisiana economy," said Mark Northington, research director at the Louisiana State Travel Office.

Illinois, Hawaii, Michigan, Florida and Tennessee were other states in the top ten travel office budgets that showed increases from the previous year.

A large component of each state's travel office budget is the amount allocated for advertising purposes. Illinois intends to spend the most on advertising, spending $10 million this year. New York, Missouri, Louisiana and Hawaii round out the top 5.

With 49 of the 50 states reporting, the average advertising budget for 1990-91 is more than $2.4 million, representing a significant increase over the 1980 average of $643,500 per state.

The 1990-91 Survey of State Travel Offices is based upon questionnaires completed by representatives of all the state travel offices, and the District of Columbia.

In addition to detailed budget breakdowns, the survey also provides information about state governments' programs including: General Administration, Organization, Advertising and Promotion, Press and Public Relations, Research and Welcome Centers.

The 1990-91 Survey of State Travel Offices is available for $75 and can be purchased by contacting the Data Center at (202) 293-1040. (Data Center members will be receiving a complimentary copy).

TOP TEN LIST

1.	*Illinois*	*$31.9 million**
2.	*Hawaii*	*22.3*
3.	*Texas*	*19.4*
4.	*Pennsylvania*	*14.8*
5.	*Michigan*	*14.5*
6.	*New York*	*14.1*
7.	*Florida*	*11.9*
8.	*Tennessee*	*10.9*
9.	*Alaska*	*10.2*
10.	*Louisiana*	*9.5*

* *Projected numbers for 1990-91*

Rising Airline Fares Lead Travel Price Increase

Following a moderate increase in November, the cost of travel in the United States rose 0.6 percent in December. The increase was largely due to a 3.9 percent jump in airline fares, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. increased to 142.1 (1982 - 84 = 100) during December.

For comparison, the overall cost of goods and services Americans purchased as measured by the Consumer Price Index (CPI) remained unchanged in December at 133.8.

Travel Price Index and Components

December 1990 TPI Component	Monthly % Change Nov. 1990 to Dec. 1990	Annual % Change Dec. 1989 to Dec. 1990
Transportation	0.7	30.2
Airline Fares	3.9	22.7
Other Intercity Trans.	1.1	6.6
Intracity Public Trans.	0.2	7.7
Motor Fuel	-1.6	36.5
Lodging	0.7	15.8
Food and Beverages Away From Home	0.2	4.6
Entertainment	-0.2	5.3
TRAVEL PRICE INDEX	0.6	13.0
CONSUMER PRICE INDEX	0.0	6.1

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

For the first time in four months, motor fuel costs decreased. The cost of motor fuel did show the highest increase over the last 12 months, increasing nearly 37 percent over a year ago.

Overall transportation costs rose 0.7 percent in December, and jumped more than 30 percent over the last 12 months. Lodging and food and beverages away from home showed moderate increases in December, while entertainment costs dropped 0.2 percent for the month. Over the past 12 months, the TPI rose 13.0 percent, influenced greatly by rising airline fares and motor fuel costs. The CPI rose more than 6 percent over the same 12 month period.

Overall Travel Decreases 2 Percent in October

For the first time since May 1990 overall travel has decreased. Travel in October dropped more than 2 percent below last October's level with more than 96 million person-trips taken by U.S. residents, according to the Data Center's latest National Travel Survey (NTS) results. (A person-trip measures each person traveling 100 miles or more away from home.)

Vacation travel contributed largely to the 2 percent decrease in overall October travel. There was a 4.5 percent decrease in vacation travel this past October over last October, with more than 64 million person-trips.

The average duration of a vacation trips also dropped substantially from 5 nights in October 1989 to 4.1 nights this past October.

Pleasure travel showed one of the few increases in October 1990, increasing nearly 1 percent with more than 74 million person-trips.

Even though pleasure travel increased in October, the average duration of a pleasure trip decreased from 4.8 nights last October to 3.7 nights in October 1990.

The average party size remained stable, with an average of less than 2 persons per trip in October. Even though vacation travel showed a decrease in October, the average party size was larger, increasing from 1.9 persons last October to 2.1 persons this past October.

Automobile travel showed a slight increase in October with more than 74 million person-trips. Travelers who used the automobile as a mode of transportation traveled shorter durations in October, compared to October 1989. The average duration of a automobile person-trip was 3 nights this past October, compared to 3.7 nights last October.

Regional travel remained fairly consistent in October, as the Southeast, Great Lakes and West regions all showed increases for the month, while the Northeast and Midwest experienced declines in traveler volumes.

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel Industry Association of America, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C., 20036. (202) 293-1040.

Dr. Suzanne D. Cook, Executive Director
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TRAVEL PRINTOUT reports on Data Center projects, national travel research conducted by other organizations and trends in the U.S. Travel Industry. Subscriptions are $75 per year; Foreign countries, $80 per year, payable in U.S. funds. ISSN: 0744-6233.

TRC Slides Available

How did the travel industry fare in 1990? Did domestic travel continue to increase? How did the transportation industry do in light of the Middle East crisis?

The answers to these, and more questions, are available from Suzanne Cook's speech on the 1990 review of domestic travel at the 1990 Travel Review Conference. Data Center members can purchase Dr. Cook's script and slide presentation for $150, others may purchase the presentation for $275.

Dr. Cook's speech discusses the volume of travel in 1990, trends, business and vacation travel, the transportation industry developments, the effects of the economy, and major issues affecting the travel industry in 1990.

The Travel Review Conference, held on February 4 in Washington, D.C., included Senator John Rockefeller (D-WV) and Martin Shugrue, Jr., trustee at Eastern Airlines, among others.

The script and slides from Suzanne Cook's presentation on the 1990 review of domestic travel can be purchased by contacting the Data Center at (202) 293-1040.

Discoveries needed...

Do you have a travel research project that deserves a little recognition? Travel Printout is the place in the monthly "Discoveries" section.

"Discoveries" is a Travel Printout feature designed to give added exposure to all types of travel-related research.

To submit your company's travel research projects, send a brief description of the report, including the price, address, and contact name, to Scott Dring, U.S. Travel Data Center, 1133 21st Street, Washington, D.C. 20036.

Visitor Volume at National Parks

Region	NOV 1990 visits	% Change from NOV 1989	Year to Date % Change 1990/89*
NEW ENGLAND	728,006	10.6%	1.4%
MIDDLE ATLANTIC	1,598,108	-5.4	-15.7
SOUTH ATLANTIC	5,100,284	8.6	-1.9
EAST SOUTH CENT.	1,199,050	-24.4	-20.7
EAST NORTH CENT.	252,736	24.7	-0.8
WEST NORTH CENT.	453,124	33.3	1.1
WEST SOUTH CENT.	575,750	0.8	-7.4
MOUNTAIN	1,753,587	-3.9	2.4
PACIFIC	2,728,992	8.7	-7.3
TOTAL	14,389,637	2.2	-5.2

* Percent change figures may not be consistant with those previously reported due to National Park Service revisions.

Census regions: New England Conn., Maine, Mass., N.H., R.I., Vermont. Middle Atlantic N.J., N.Y., Penn. S. Atlantic: Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. East South Central: Ala., Ky., Miss., Tenn. East North Central: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. West South Central: Ark., La., Okla., Texas. Mountain Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. Pacific: Alaska, Calif., Hawaii, Ore., Wash.

Summer Travel Continues Popularity

Summer travel has increased more than 15 percent since 1985, according to the U.S. Travel Data Center's National Travel Survey.

Despite concerns this past summer over economic conditions, overall summer travel increased more 2 percent in 1990 with more than 437 million person-trips. (A person-trip is one person traveling 100 miles or more away from home).

Vacation travel, the primary purpose of travel in the summer months, has also seen consistent growth since 1985, increasing nearly 19 percent. This past summer there were 326 million vacation person-trips, a record high.

The National Travel Survey summer report, can be purchased for $100, by contacting the Data Center. For additional information on the Summer Travel Report, contact Elizabeth Stewart at (202) 293-1040.

Don't Forget...

The Data Center now provides a free listing of all available publications. This in-depth guide lists all Data Center publications, in addition to reports from the United States Travel and Tourism Administration (USTTA) and the reports from the Discover America 2000 series.

The agreement with the USTTA enables the Data Center to market such reports as the *In-Flight Surveys* and the *Pleasure Travel Market to North America.*

The publication guide also includes the Discover America 2000 Marketing Research Series. The series includes *Discover America 2000: The Implications of America's Changing Demographics and Attitudes on the U.S. Travel Industry* and a newly released report entitled *Discover America 2000: The Mature Market.*

If you would like a complete and free listing of domestic and international travel research, contact the Data Center at (202) 293-1040.

Current Travel Indicators - 1990

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Oct	$5,600	million	8.7	5.4	7.3
Eating and Drinking Places(2)	Nov	$15,157	million	-0.9	3.7	5.0
Gasoline Service Stations(2)	Nov	$11,947	million	-0.4	22.2	10.6
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Oct	63.2	percent	-0.8	-1.9	0.7
Real Demand for Commercial Lodging(4)	Oct	67.5	million	6.4	1.5	3.6
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Dec	25.9	billion	1.8	0.2	2.3
Int'l Revenue Passenger-Miles	Dec	8.9	billion	11.1	11.1	15.5
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Nov	42.1	billion	-6.1	1.3	3.2
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Nov	492.1	million	1.2	6.2	3.6
Travel Price Index (1982 - 84 = 100) (8)	Nov	141.3		0.4	12.1	7.8
	Dec	142.1		0.6	13.0	8.3
U.S. Resident Travel						
Total Person-trips(9)	Oct	96.3	million	-17.1	-2.0	2.9
Vacation Person-trips(9)	Oct	64.1	million	-24.1	-4.3	3.3
Total Person-nights(10)	Oct	356.3	million	-17.1	n/a	n/a
Vacation Person-nights(10)	Oct	262.8	million	-24.1	n/a	n/a
Public Use of National Parks (11)						
Visits	Oct	21,092,632		-6.0	-5.8	-6.3
Overnight Stays	Oct	1,151,253		-43.8	-6.3	1.0
Foreign Arrivals to the U.S.						
From Overseas(12)	Sept	1,362,928		-16.9	3.9	5.7
From Canada(13)	Nov	1,216,221		-9.5	17.4	13.2
From Mexico(12)	Sept	100,850		-35.7	9.9	6.1
U.S. Citizen Departures						
To Overseas(12)	Aug	1,611,900		-2.3	9.5	9.4
To Canada(13)	Nov	583,022		-29.8	5.9	1.3
Domestic Demand for Gasoline						
Barrels/Day(14)	Nov	7,224	thousands	0.3	-1.8	-1.7

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary, revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted. 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary. U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary, revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary, unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary. Source: U.S. Department of Energy.

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TRAVEL PRINTOUT

US Travel Data Center

February 1991 **Volume 20, Number 2**

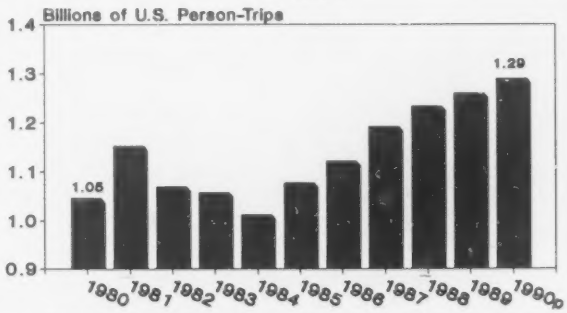
Domestic Travel Continues Growth in 1990

"There were a record number of person-trips in 1990, even though travel did show a slight decline in October and November with an additional decline expected in December," said Suzanne Cook, executive director of the U.S. Travel Data Center, during the 1990 Review of Domestic Travel at the Travel Review Conference in Washington, D.C.

The fifth annual conference, co-sponsored by the Data Center, the Travel and Tourism Research Association (TTRA) and the United States Travel and Tourism Administration (USTTA), was held on February 4 at the Omni Shoreham Hotel and kicked off a week of travel associated events.

Growth in U.S. resident travel continued in 1990, with the volume of travel increasing 2 percent over 1989. There were 1.3 billion person-trips in 1990. (A person-trip is one person traveling 100 miles or more away from home).

RECORD 1.3 BILLION PERSON-TRIPS IN 1990



Source: U.S. Travel Data Center's National Travel Survey

The unstable economy and the middle east crisis did have an effect on the industry. The cost of travel in the U.S., as measured by the Data Center's Travel Price Index, increased 8.3 percent in 1990 over the previous year. In comparison, the consumer price index, a measure of all goods and services, showed a smaller 5.4 percent increase.

Summer vacation travel in 1990 showed an increase of 2 percent over 1989. The August 2 invasion of Kuwait did not seem to affect the volume of summer travel.

Dr. Cook told the 300 plus delegates that for the first time since 1986, August was the most popular month for summer vacation travel. "We speculate that the crisis may have induced people to travel more in August in anticipation that travel prices would increase in the near future," explained Cook.

Other highlights included:

- Vacation travel increased 2 percent in 1990, but as with total travel it began the year strong and then slowed in May. In addition, vacation travel accounted for 70 percent of all travel in 1990.
- Business travel showed a decrease in 1990. The decrease is no surprise because of the record level of business travelers last year.
- The Southeast region of the United States was again the most popular destination for travelers in 1990. The West and Midwest were the second and third most popular, respectively.
- Automobile travel was again the most popular mode of transportation in 1990. In fact, auto/truck/rv accounted for 79 percent of all travel in 1990, an increase of 1 percentage point in share.

The 1990 domestic travel review also discussed different sectors of the industry. One sector that seems to have done very well in 1990 was the cruise lines. According to the Cruise Lines International Association, the number of North American passengers rose 12 percent over the previous year.

The Data Center's 1990 Review of Domestic Travel also included an economic review and an evaluation of other sectors of the industry, such as the transportation, cruise line and lodging industries. The presentation also discusses trends and even some historical analysis of the travel industry.

Data Center members may purchase Dr. Cook's slide presentation for $150, others may purchase the presentation for $275. To order slides contact the Data Center at (202) 293-1040.

To order the complete conference proceedings, contact Mari Lou Wood, executive director of TTRA at (801) 581-3351. *(All conference attendees will be receiving a complimentary copy).*

Rising Hotel Costs Lead Travel Price Increase

Despite a 4 percent decrease in transportation prices, the largest decrease since 1986, the cost of overall travel in the United States rose 2.4 percent in January. The increase was largely due to a more than 10 percent jump in lodging prices, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. increased to 145.5 (1982 - 84 = 100) during January.

For comparison, the overall cost of goods and services Americans purchased as measured by the Consumer Price Index (CPI) increased to 134.6 in January.

Travel Price Index and Components

January 1991 TPI Component	Monthly % Change Dec. 1990 to Jan. 1991	Annual % Change Jan. 1990 to Jan. 1991
Transportation	-4.0	19.6
Airline Fares	0.6	21.9
Other Intercity Trans.	0.5	6.7
Intracity Public Trans.	0.5	4.2
Motor Fuel	-7.5	18.5
Lodging	10.6	21.4
Food and Beverages Away From Home	0.2	4.4
Entertainment	0.7	5.3
TRAVEL PRICE INDEX	2.4	12.8
CONSUMER PRICE INDEX	0.6	5.7

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

For the second consecutive month, motor fuel costs decreased. Even though motor fuel prices decreased 7.5 percent in January, the cost of motor fuel did increase more than 18 percent over the past 12 months.

Overall transportation costs decreased for the first time since July of last year. But during the last 12 months, transportation prices increased more than 19 percent.

Lodging and airline fares jumped more than 21 percent during the last 12 months. In addition, the TPI rose 13.0 percent and the CPI rose more than 6 percent over the past 12 months.

For Second Consecutive Month Overall Travel Decreases

For the second straight month, overall travel within the United States decreased. This past November overall travel dropped 1.3 percent below last November's level, with more than 94 million person-trips taken by U.S. residents, according to the Data Center's latest National Travel Survey (NTS) results. (A person-trip measures each person traveling 100 miles or more away from home.)

Nearly every segment of the travel industry suffered declines in November, particularly air travel. Air travel, in terms of person-trips, decreased 18 percent below last November's levels. This decrease was mainly due to escalating air fares, which jumped more than 18 percent in November, according to the TPI.

Vacation travel contributed largely to the decrease in overall November travel. There was a 6.1 percent decrease in vacation travel this past November over last November with more than 62 million person-trips. It was the second consecutive month that vacation travel showed a decrease.

Even though vacation travel declined in November, travelers did increase the duration of their vacation. The average duration of a vacation this past November was 4.8 nights, compared to 4.3 nights in November 1989.

The average travel party size remained stable, with an average of less than 2 persons per trip in November. In addition to vacationers traveling for longer durations, they also traveled in larger groups. The average travel party size in November 1990 was 2.2 persons, increasing from 1.9 persons in November 1989.

One of the few bright spots in November travel was automobile travel. There were more than 75 million auto person-trips, an increase of 3 percent over November 1989.

Regional travel remained fairly consistent in November, as the Great Lakes Midwest and West regions both showed increases for the month, while the Northeast and Southeast experienced declines in traveler volumes.

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Dr. Suzanne D. Cook, Executive Director
Scott M. Dring, Editor

TRAVEL PRINTOUT reports on Data Center projects, national travel research conducted by other organizations and trends in the U.S. Travel Industry. Subscriptions are $75 per year; Foreign countries, $80 per year, payable in U.S. funds. ISSN: 0744-6233.

Rockefeller stresses importance of travel and tourism industry

"We need to give the travel and tourism industry the serious attention it deserves as our nation's largest export industry," said Sen. John Rockefeller (D-WV), on February 4 at the Travel Review Conference.

Rockefeller, who recently became the chairman of the Subcommittee on Foreign Commerce and Tourism, said that it was natural for him to make tourism a key part of his agenda in the Senate.

In July, Rockefeller held a hearing in the subcommittee on passenger facilitation, where suggestions were made to more efficiently process and document inbound travelers. He pointed out that several of the recommendations have become law.

"For me, travel and tourism is not an abstraction. As governor of West Virginia I made tourism development a top priority and it paid off handsomely," said Rockefeller.

Discoveries...

The older population, persons 65 years or older, numbered 31 million in 1989, representing more than 12 percent of the U.S. population, according to the American Association of Retired Person's (AARP) "A Profile of Older Americans: 1990."

The recently released brochure, which was prepared in conjunction with the Administration on Aging (AoA) and the U.S. Department of Health and Human Resources, projected that the older population would climb to more than 65 million in the year 2030, representing 22 percent of the U.S. population.

According to the brochure, a child born in 1988 could expect to live 74.9 years, about 28 years longer than a child born in 1900. The major part of this increase occurred because of reduced death rates for children and young adults.

"A Profile of Older Americans: 1990," has statistics, maps, charts and graphs under a variety of headings. To receive a complimentary copy of the brochure, send your name and address on a postcard to: A Profile of Older Americans: 1990, AARP Fulfillment, 1909 K Street, N.W., Washington, D.C. 20049. Allow 6-8 weeks for delivery.

To submit your company's travel research projects, send a brief description of the report, including the price, address, and contact name, to Scott Dring, U.S. Travel Data Center, 1133 21st Street, Washington, D.C. 20036.

Visitor Volume at National Parks

Region	DEC 1990 visits	% Change from DEC 1989	Year to Date % Change 1990/89*
NEW ENGLAND	374,095	47.6%	2.1%
MIDDLE ATLANTI	1,070,786	19.1	.7
SOUTH ATLANTIC	3,773,764	37.6	3.1
EAST SOUTH CENT.	834,264	10.3	3.1
EAST NORTH CENT.	179,984	19.8	-.2
WEST NORTH CENT.	173,903	4.4	.1
WEST SOUTH CENT.	353,306	4.7	-6.5
MOUNTAIN	1,151,177	-9.7	1.9
PACIFIC	2,253,242	-3.7	-1.9
TOTAL	10,164,521	13.9	1.0

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: New England: Conn., Maine, Mass., N.H., R.I., Vermont. Middle Atlantic: N.J., N.Y., Penn. S. Atlantic: Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. East South Central: Ala., Ky., Miss., Tenn. East North Central: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. West South Central: Ark., La., Okla., Texas. Mountain: Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. Pacific: Alaska, Calif., Hawaii, Ore., Wash.

* NOTE: As of December 1990, National Park data will come directly from the National Park Service. This improvement will enable the Data Center to publish more accurate data.

Louisiana Vaults into STO Budget's Top Ten List

Louisiana ranked tenth in 1990-91 projected state travel office budgets, increasing its budget more than 81 percent with more than $9.5 million, according to the Data Center's *1990-91 Survey of State Travel Offices.*

The 18th annual report, which provides information of state travel office budgets by category, advertising, promotion and research programs, listed Illinois as having the highest projected state travel office budget in fiscal year 1990-91.

States are planning to spend nearly $356 million for travel and tourism development and promotion in fiscal year 1990-91, a more than 5 percent increase from last year's total.

The 1990-91 Survey of State Travel Offices is based upon questionnaires completed by representatives of all the state travel offices, and the District of Columbia. The report is available for $75 and can be purchased by contacting the Data Center at (202) 293-1040.

USTTA Releases Third Quarter Report

The United States Travel and Tourism Administration (USTTA) has released its third quarter *1990 In-Flight Survey of International Air Travelers* of overseas and Mexican air visitors to the United States.

The report, which will be featured in next month's *Data Center Insider*, can be purchased for $175.

Current Travel Indicators - 1990/91

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Nov	$4,688	million	-16.3	5.2	6.8
	Dec	$3,722	million	-20.6	2.1	6.5
Eating and Drinking Places(2)	Dec	$15,286	million	0.1	5.6	5.1
	Jan	$15,410	million	0.8	4.2	4.2
Gasoline Service Stations(2)	Dec	$11,924	million	-1.7	19.6	11.5
	Jan	$11,651	million	-2.3	15.9	15.9
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Nov	62.4	percent	-1.3	-4.4	0.2
	Dec	62.1	percent	-0.5	-4.3	-0.2
Real Demand for Commercial Lodging(4)	Nov	57.5	million	-14.8	0.1	3.3
	Dec	47.8	million	-16.9	1.0	3.2
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Jan	25.0	billion	-3.7	-1.3	-1.3
Int'l Revenue Passenger-Miles	Jan	8.1	billion	-8.9	-3.3	-3.3
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Dec	40.4	billion	-4.0	1.7	3.0
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Dec	508.8	million	3.4	3.7	3.6
Travel Price Index (1982 - 84 = 100) (8)	Jan	145.5		2.4	12.8	12.8
U.S. Resident Travel						
Total Person-trips(9)	Nov	94.6	million	-1.8	-1.3	2.5
	Dec	93.6	million	-1.1	-13.7	1.1
Vacation Person-trips(9)	Nov	62.1	million	-3.1	-6.1	2.6
	Dec	63.2	million	1.8	-19.1	0.6
Total Person-nights(10)	Nov	387.9	million	8.9	n/a	n/a
	Dec	402.5	million	3.8	n/a	n/a
Vacation Person-nights(10)	Nov	298.1	million	13.4	n/a	n/a
	Dec	322.3	million	8.1	n/a	n/a
Visitor Volume at National Park Service Areas (11)						
Recreation Visits	Dec	10,164,521		-29.4	13.9	1.0
Overnight Stays	Dec	347,621		-48.7	-11.6	0.7
Foreign Arrivals to the U.S.						
From Overseas(12)	Oct	1,266,441		-7.1	11.0	6.2
From Canada(13)	Dec	1,031,627		-15.2	14.7	13.3
From Mexico(12)	Oct	111,246		10.3	20.9	7.4
U.S. Citizen Departures						
To Overseas(12)	Sept	1,346,400		-16.5	8.3	9.3
To Canada(13)	Dec	547,139		-6.2	0.7	1.3
Domestic Demand for Gasoline						
Barrels/Day(14)	Dec	6,920	thousands	-4.6	-6.6	-2.1

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

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TRAVEL PRINTOUT

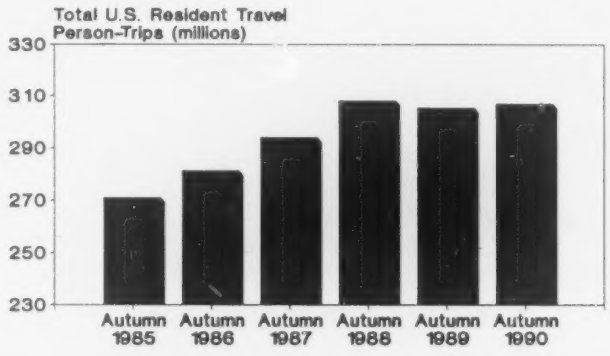
US Travel Data Center

March 1991 **Volume 20, Number 3**

Escalating Travel Prices Impact Autumn Travel Season

The Middle East crisis and the subsequent escalation of travel prices contributed to a slowdown in the growth of travel this past autumn. Autumn travel in 1990 increased less than 1 percent over autumn 1989, according to the Data Center's *1990 Autumn Travel Market Report.*

There were a total of 307 million U.S. resident person-trips taken in the months of September, October and November 1990. (A person-trip is one person traveling 100 miles or more away from home).



This autumn marked the second consecutive autumn that travel has been flat, this after five years of growth. In fact, since 1984 autumn travel has increased more than 16 percent.

"Americans traveled for shorter periods of time and stayed closer to home this past autumn," said Suzanne Cook, executive director at the Data Center. "Possibly to offset escalating travel prices."

The average duration of a trip fell from 4.2 nights in autumn 1989 to 3.8 nights this past autumn. Pleasure travel showed one of the largest declines in duration during autumn 1990, dropping nearly one full night, while business travel, on the other hand, showed an increase.

Travel this past autumn was also shorter in round-trip distance. The average distance of a trip dropped from 920 round-trip miles in autumn 1989 to 780 round-trip miles in autumn 1990.

The largest decrease in average round-trip miles was in business travel. The average round-trip distance of a business trip dropped from 1,130 miles in autumn 1989 to 900 round-trip miles this past autumn, a drop of more than 200 miles.

The Great Lakes region enjoyed the largest increase in travel volume with the West and Southeast also showing substantial increases, while the Northeast and Midwest decreased in travel volume as destinations.

One of the major factors for the stabilization in autumn travel was the acceleration of travel prices due to the Iraq invasion of Kuwait. The price of crude oil soared from $20 a barrel in the spring to $40 a barrel in the fall of 1990. In addition, self-serve unleaded gasoline peaked at $1.39 in late November, according to AAA.

According to the Data Center's Travel Price Index (TPI), the overall cost of travel for the autumn season rose nearly 12 percent from the previous summer. The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S., grew to 140.5 (1982 - 84 = 100) during these three months.

Lodging costs, on the other hand, showed monthly decreases in September, October and November. The decrease in prices showed in the volume of person-trips involving stays in hotels/motels, which jumped nearly 8 percent this past autumn.

In addition, 47 percent of all person-trips this past autumn involved a stay at a hotel or motel, while 36 percent were at friends and relatives home. More than 46 percent of all pleasure person-trips involved stays at friends and relatives and 40 percent of pleasure travel was at hotels or motels.

The 1990 Autumn Travel Market Report is one of four seasonal reports based on the Data Center's National Travel Survey. The 100 pages include information on air and auto travelers, vacationers, business travelers and senior travel, among other segments.

The Autumn report and the other seasonal reports can be purchased for $100 by contacting the Data Center at (202) 293-1040. For additional information contact Julie Bowers at the Data Center. *(Members of the Data Center will be receiving a complimentary copy).*

INSIDE: Data Center Insider
Features TEIM Revision

Motor Fuel Prices Decrease in February

The cost of travel in the United States showed its smallest monthly percentage increase in February since September 1990, rising only 0.1 percent. The slight increase was primarily due to the nearly 8 percent decrease in motor fuel costs, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. increased to 145.6 (1982 - 84 = 100) during February.

For comparison, the overall cost of goods and services Americans purchased as measured by the Consumer Price Index (CPI) also increased 0.1 percent to 134.8 in February.

Travel Price Index and Components

February 1991 TPI Component	Monthly % Change Jan. 1991 to Feb. 1991	Annual % Change Feb. 1990 to Feb. 1991
Transportation	-4.3	13.9
Airline Fares	0.5	19.6
Other Intercity Trans.	0.0	6.7
Intracity Public Trans.	0.7	3.8
Motor Fuel	-7.9	10.0
Lodging	2.3	18.9
Food and Beverages Away From Home	0.4	4.8
Entertainment	0.2	5.5
TRAVEL PRICE INDEX	0.1	11.2
CONSUMER PRICE INDEX	0.1	5.3

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

For the third consecutive month, motor fuel costs decreased. Even though motor fuel prices decreased 7.9 percent in February, the cost of motor fuel did increase 10 percent over the past 12 months.

Overall transportation costs decreased for the second consecutive month and showed its largest decrease since April 1986. But during the last 12 months, transportation prices increased more than 13 percent.

Lodging and airline fares jumped more than 18 percent during the last 12 months. Overall, the TPI rose 11.2 percent and the CPI rose more than 5 percent over the past 12 months.

December Travel Decreases

The U.S. travel industry felt the negative effects of an economic recession at home and the conflict in the Gulf as overall travel by U.S. residents decreased nearly 14 percent in December. There were more than 93 million person-trips taken by U.S. residents this past December, according to the Data Center's latest National Travel Survey (NTS) results. (A person-trip measures each person traveling 100 miles or more away from home.)

Every segment of the travel industry suffered declines in December, particularly air and hotel/motel travel. These declines reflect, at least part, the escalating air fares, which jumped more than 22 percent in December, according to the TPI.

The average travel party size and the average duration of travel remained stable this past December. There were an average of 2 persons per trip in December with the average duration of a trip remaining at 4.3 nights in December.

Vacation travel contributed significantly to the overall decrease in overall December travel. There was a 19 percent decrease in vacation travel this past December as compared to last December with more than 63 million person-trips. It was the third consecutive month that vacation travel showed a decrease.

The average round-trip distance dropped substantially this past December. The 940 round-trip miles averaged last December dropped to 830 round-trip miles in December 1990, confirming that travelers stayed closer to home.

Regional travel patterns remained fairly consistent in December, as the Great Lakes hosted 13.5 million travelers, posting a substantial gain for the year-to-date. The Midwest and West regions both showed moderate full-year 1990 increases of 4.1 and 2.1 percent, respectively, while the Northeast and Southeast continued to experience declines in traveler volumes for the year.

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1990 U.S. Hotel Guest Study Profiles Hotel Guests, Segments

Adults in one out of every three U.S. households reported staying in hotels during a recent three month period, according to the Hotel & Motel Index's *1990 U.S. Hotel Guest Study.*

The study, which is conducted in cooperation with the U.S. Travel Data Center, is based on a mail panel survey of 28,589 U.S. households, conducted during the months of April, May and June 1990. More than 9,000 responding households reported one or more hotel stays during the study period.

The report presents insights on who these guests were, why they were traveling, the types of hotels they visited and their satisfaction with their hotel visits.

The average hotel visit lasted 3.3 nights with almost two-thirds of all visits lasting only one or two nights. A majority of the hotel visits (56 percent) were for leisure purposes with the remainder (44 Percent) being business related.

Among the leisure visits, weekend escapes, sightseeing or tours and visits to friends or relatives each accounted for about 10 percent of hotel stays. Other vacation or personal travel accounted for 24 percent of hotel visits. Business trips made for conventions or other business reasons accounted for 44 percent.

Couples accounted for 45 percent of all hotel visits, while men traveling alone accounted for 32 percent and women traveling alone for 22 percent of visits. Couples visited hotels primarily for leisure, men primarily for business and women about equally for leisure and business.

Calling the hotel directly was the most frequently used method of obtaining reservations and accounted for one-quarter of all stays, according to the survey. The hotel's toll-free phone number, travel agents and company travel managers were other frequently used methods.

Travel agents accounted for 14 percent of all hotel reservations and guests using travel agents were more likely to be men or women traveling alone and less likely to be couples. Travel agents were more important to upscale hotels, as over half of all reservations they made were placed with upscale/luxury hotels.

There are four reports that will be published from this study. The first of these, *Profile of U.S. Hotel Guests and Key Guest Segments,* is now available through the Data Center. This report describes the total U.S. hotel guest market in overall terms and then provides detail on 12 key guest segments.

The hotel guest segments include: business, leisure, frequent, male, female and couples hotel guests, hotel guests with reservations made by travel agents, upscale resort and hotel guests, mid-price and budget and downtown, airport and suburban hotel guests.

The report can be purchased from the Data Center for $300. To purchase the report, contact the Data Center at (202) 293-1040.

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Data Center Members will be receiving a complimentary copy.

Data Center Insider

The U.S. Travel Data Center March 1991

Travel Economic Impact Model Revision Completed

Revisions of the only national model which produces the economic impact of travel at the national, state and local levels has been completed after nearly two years of improvements and updates, announced the U.S. Travel Data Center.

"The completed revision of the Travel Economic Impact Model (TEIM) ensures continued and greater accuracy, flexibility and stability, in reaching our goal of providing the most reliable travel economic impact estimates to the travel industry," said Suzanne Cook, executive director at the U.S. Travel Data Center. "Estimates produced by the revised model will be released in April."

"The completed revision of the Travel Economic Impact Model ensures continued and greater flexibility and stability, in reaching our goal of providing the most reliable travel economic impact estimates to the travel industry."

The TEIM provides states, cities and regions with a reliable estimate of economic impact and enables federal, state and local government officials and legislators to make intelligent policy decisions concerning the travel and tourism industry.

The announcement of the completed revision marks the end of a 20-month project that included consulting from a technical review panel comprised of travel industry authorities.

The revised model includes the following improvements over the original version:

- **Greater Accuracy.** The revised model takes advantage of more reliable travel and tourism data that were not available when the model was originally developed.
- **Greater Stability.** The revised model relies much more on annual data from authoritative sources, rather than benchmark data every 5 or 10 years.
- **Greater Flexibility.** The revised model is more closely tied to the Data Center's National Travel Survey, which provides estimates of the spending and impact of various types of travel, forecasts of expenditures, and integration with the United States Travel and Tourism Administration's (USTTA) foreign visitor expenditure series.

In addition, there are three new components added to the model: The Multiplier Component, Foreign Visitor Impact Component and Forecasting Component. The Multiplier Component allows the Data Center to produce estimates of total (direct and indirect) statewide travel economic impact estimates.

The Foreign Visitor Impact Component is designed to estimate the impact of foreign visitor spending at the national and state levels using input data from the USTTA's *In-Flight Survey of International Air Travelers*. The Forecasting Component enables the Data Center to provide projections of travel spending and impact at the state and national level for one to five years into the future.

In 1989, funding became available for a major revision of the TEIM, to take advantage of new and improved data on travel and tourism activities and costs to create a more flexible and stable model. The funding was made possible by a $150,000 contract from the U.S. government, a $50,000 contribution from the Travel Industry Association of America (TIA) and other contributions from the National Council of State Travel Directors and the private sector.

Even though there have been several additions and improvements to the TEIM, the basic approach to estimating the economic impact of U.S. travel away from home was retained in the revision process.

The Data Center will release data on the economic impact that travel and tourism has on each state in April, when it publishes its *1989 Impact of Travel on State Economies*.

The report will cover travel spending in each state, the employment, payroll income and tax revenue generated by this spending and the impact of travel spending on six industry segments.

Since 1977, when the first benchmark estimates were developed, the TEIM has been providing the only consistent annual estimates of direct travel-generated spending and its impact in terms of employment, payroll and tax revenue at the national, state and local levels.

NEWLY RELEASED

- 1990 Autumn NTS Seasonal Report
- 1990-91 Survey of State Travel Offices
- 1990 U.S. Hotel Guest Study

Discoveries...

Tourism is one of the top three industries in 39 states, according to The National Conference of State Legislator's *Travel and Tourism: A Legislator's Guide.*

The report, which utilizes statistics from the Data Center and other organizations, emphasizes the importance of the travel industry to the economic growth in the states.

Other information in the publication includes: An overview of the travel industry, analysis of its economic impact, emerging opportunities for states and the role and scope of state travel offices.

Travel and Tourism: A Legislator's Guide can be purchased for $20. Prepaid orders should be sent to the NCSL Book Order Department, 1560 Broadway, Suite 700, Denver, Colorado 80202. For additional information contact the NCSL at (303) 830-2200.

To submit your company's travel research projects, send a brief description of the report, including the price, address, and contact name, to Scott Dring, U.S. Travel Data Center, 1133 21st Street, Washington, D.C. 20036.

Summer Vacation Forecast to be held in Atlanta

The Data Center's tenth annual Summer Vacation Travel Forecast news conference has been tentatively set for May 21 in Atlanta. The news conference will be held in conjunction with The American Automobile Association (AAA) which will release its Memorial Day Travel Forecast.

Last year the Summer Vacation Travel Forecast was held in conjunction with AAA for the first time in Orlando, Florida.

This year's forecast will include a special analysis of how the Gulf War and recession is expected to affect the summer vacation season. This analysis will review consumer's travel attitudes and the impact that the Gulf War had on travel.

Other information will include the most traveled regions in the U.S., the most popular modes of transportation, distance and duration of vacations, accommodation usage, U.S. travel to foreign countries and other forecasts.

This year's forecast can be purchased through the Data Center after the May 21 news conference in Atlanta. Data Center full members will receive a free copy while all other members may purchase the forecast at a special discounted price to be offered in next month's issue of Travel Printout.

Visitor Volume at National Parks

Region	JAN 1991 visits	% Change from JAN 1990	Year to Date % Change 1991/90*
NEW ENGLAND	263,032	6.0%	6.0%
MIDDLE ATLANTIC	999,770	-0.3	-0.3
SOUTH ATLANTIC	2,951,531	-8.5	-8.5
EAST SOUTH CENT.	861,247	-1.6	-1.6
EAST NORTH CENT.	228,264	21.3	21.3
WEST NORTH CENT.	154,042	-12.4	-12.4
WEST SOUTH CENT.	338,136	-25.2	-25.2
MOUNTAIN	1,220,855	-2.7	-2.7
PACIFIC	2,610,425	2.9	2.9
TOTAL	9,627,302	-3.3	-3.3

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: New England: Conn., Maine, Mass., N.H., R.I., Vermont. Middle Atlantic: N.J., N.Y., Penn. S. Atlantic: Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. East South Central: Ala., Ky., Miss., Tenn. East North Central: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. West South Central: Ark., La., Okla., Texas. Mountain: Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. Pacific: Alaska, Calif., Hawaii, Ore., Wash.

NOTE: As of December 1990, National Park data will come directly from the National Park Service. This improvement will enable the Data Center to publish more accurate data.

Western European Travel Increases in 1990

Western European's travel increased more than 3 percent in 1990 and their spending on travel jumped nearly 4 percent, according to the European Travel Data Center's (ETDC) *European Travel Monitor.*

Even though there was growth in overall travel in 1990, there was a decline in the number of nights spent abroad by Western Europeans. The decrease in overnights can be attributed to the much faster growth rate of short breaks, which jumped more than 12 percent in number in 1990.

Western European travel to Eastern Europe increased 130 percent in 1990. Travel to Central Europe, which includes Austria, West and East Germany, Switzerland, increased 19 percent due largely to the recent opening of the eastern part of Germany.

The March edition of the *European Travel Monitor* highlights the 1990 World Travel Review, a seminar held in conjunction with the International Tourism Bourse in Berlin.

The ETDC compiles data on the inbound and outbound travel markets of 18 Western European countries and 5 Eastern European countries. For additional information on the ETDC contact Elizabeth Stewart of the Data Center at (202) 293-1040.

Current Travel Indicators - 1990/91

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Jan	$4,606	million	23.5	0.3	0.3
Eating and Drinking Places(2)	Feb	$15,347	million	1.3	1.5	1.8
Gasoline Service Stations(2)	Feb	$10,648	million	-4.9	6.2	8.6
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Jan	59.3	percent	-4.5	-6.6	-6.6
Real Demand for Commercial Lodging(4)	Jan	49.3	million	3.1	-1.1	-1.1
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Feb	23.2	billion	-7.3	-5.5	-3.3
Int'l Revenue Passenger-Miles	Feb	5.1	billion	-36.8	-26.8	-14.0
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Jan	36.7	billion	-9.0	-4.2	-4.2
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Jan	470.1	million	-7.6	9.8	9.8
Travel Price Index (1982 - 84 = 100) (8)	Feb	145.6		0.1	11.2	12.0
U.S. Resident Travel						
Total Person-trips(9)	Dec	93.6	million	-1.1	-13.7	1.1
Vacation Person-trips(9)	Dec	63.2	million	1.8	-19.1	0.6
Total Person-nights(10)	Dec	402.5	million	3.8	n/a	n/a
Vacation Person-nights(10)	Dec	322.3	million	8.1	n/a	n/a
Visitor Volume at National Park Service Areas (11)						
Recreation Visits	Jan	9,627,302		-5.3	-3.3	-3.3
Overnight Stays	Jan	394,440		13.5	3.3	3.3
Foreign Arrivals to the U.S.						
From Overseas(12)	Oct	1,266,441		-7.1	11.0	6.2
From Canada(13)	Jan	1,060,038		2.8	-1.3	-1.3
From Mexico(12)	Oct	111,246		10.3	20.9	7.4
U.S. Citizen Departures						
To Overseas(12)	Sept	1,346,400		-16.5	8.3	9.3
To Canada(13)	Jan	381,851		-30.2	-6.3	-6.3
Domestic Demand for Gasoline						
Barrels/Day(14)	Jan	6,725	thousands	-3.6	0.8	0.8

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary, revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1988 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary, U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary, unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary. Source: U.S. Department of Energy.

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March 1991

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Research News for the U.S. Travel Industry

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Research News for the U.S. Travel Industry

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TRAVEL PRINTOUT

US Travel Data Center

April 1991 Volume 20, Number 4

Travel Weighs Heavily on Socio-Economic Status

United States adults in the "Upper Socio-Economic" category averaged more than seven trips in 1990, according to the new Socio-Economic Status category in the Data Center's National Travel Survey (NTS).

"This additional feature in the NTS will give us a better understanding of how educational and income characteristics influence traveler behavior," said Elizabeth Stewart, manager of market research at the Data Center.

The Socio-Economic Status (SES) category, which the Data Center began to analyze this year, includes four components; Low, Low-Mid, Upper-Mid and Upper. The following is a list of the attributes in each SES group. Note the following abbreviations: Less than high school complete (LHS), high school complete (HS), college complete or more (CD+).

- *Low SES*
  LHS and less than $25,000 annual family income
  HS and less than $20,000
  Some college and less than $20,000
  CD+ and less than $15,000

- *Low-Mid SES*
  LHS and $25,000 or more
  HS and $20,000 to $39,999
  Some college and $20,000 to $24,999
  CD+ and $15,000 to $19,999

- *Upper-Mid SES*
  HS and $40,000 or more
  Some college and $25,000 to $39,999
  CD+ and $20,000 to $29,999

- *Upper SES*
  Some college and $40,000 or more
  CD+ and $30,000 or more

Source Definition: Marriott Hotels and Resorts

The NTS, a monthly telephone survey of 1,500 adults representing the total adult population of the U.S., revealed that the higher Socio-Economic groups traveled more than the lower groups in 1990. Besides the Upper SES group averaging more than 7 trips in 1990, the Upper-Mid averaged 5.9 trips, the Low-Mid 4.7 trips and the Low SES group averaged 3.8 trips in 1990.

In addition, more than 83 percent of all adults in the Upper SES group traveled within the last 12 months, while only 43 percent of adults in the Low SES group traveled during the same time period.

Marital status was consistent among the Low-Mid (65 percent), Upper-Mid (65 percent) and Upper (70 percent) SES groups. But, only 39 percent among the population in the lower SES group were married. The number of separations, divorces and widows were also considerably higher in the Lower group.

The trend towards more frequent travel among dual-income households was evident in the Upper SES group. Forty-six percent of the Upper SES group, which showed the highest volume of travel among all groups, were dual income households, more than any other group.

Portions of the new NTS analysis regarding Socio-Economic Status will be included in the Data Center's 1990 Full-Year Report, which is due to be released by the end of May. Data Center members will be receiving a complimentary copy. For more information on the Socio-Economic Status groups, contact Elizabeth Stewart at (202) 293-1040.

IT'S TIME...

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- Most popular regional destinations
- Modes of Transportation
- Duration of Summer Travel
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Transportation Prices Decrease in March

The cost of travel in the United States continued to stabilize in March increasing only 0.4 percent over the previous month. For the second consecutive month, transportation prices, which decreased 4 percent, helped restrain the overall increase in travel prices, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. increased to 146.2 (1982 - 84 = 100) during March.

For comparison, the overall cost of goods and services Americans purchased as measured by the Consumer Price Index (CPI) also showed a slight increase of 0.1 percent to 135.0 in March.

Travel Price Index and Components

March 1991 TPI Component	Monthly % Change Feb. 1991 to Mar. 1991	Annual % Change Mar. 1990 to Mar. 1991
Transportation	-4.0	9.0
Airline Fares	-2.5	13.5
Other Intercity Trans.	-2.0	4.2
Intracity Public Trans.	0.1	3.9
Motor Fuel	-5.1	5.9
Lodging	3.6	20.0
Food and Beverages Away From Home	0.2	3.8
Entertainment	-0.1	4.8
TRAVEL PRICE INDEX	0.4	10.1
CONSUMER PRICE INDEX	0.1	4.9

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

For the fourth consecutive month, motor fuel costs decreased. Even though motor fuel prices decreased 5.1 percent in March, the cost of motor fuel did increase nearly 6 percent over the past 12 months.

Overall transportation costs decreased for the third consecutive month. But during the last 12 months, transportation prices increased 9 percent. In addition, airline fares decreased 2.5 percent in March, but still showed an increase of more than 13 percent during the last 12 months.

Overall, the TPI rose 10.1 percent and the CPI rose nearly 5 percent over the past 12 months.

Autumn Travel Continues to Prosper

Autumn travel has increased more than 16 percent since 1984, even though this past autumn increased only percent, according to the U.S. Travel Data Center's National Travel Survey.

Even though the Middle East crisis caused a slowdown in the autumn travel season, there were still 307 million U.S. resident person-trips taken in the months of September, October and November. (A person-trip is one person traveling 100 miles or more away from home).

One of the largest increases in autumn travel has come from vacation travel. In fact, autumn vacation travel has increased more than 39 percent since 1983.

The National Travel Survey Autumn Report can be purchased for $100, by contacting the Data Center at (202) 293-1040. (Data Center members will receive a complimentary copy). For additional information on the Autumn Travel Report, contact Elizabeth Stewart.

USTDC/AAA Gear up for News Conference

The Data Center and the American Automobile Association will hold its second annual Summer Vacation Travel Forecast/Memorial Day Weekend Forecast news conference on Tuesday, May 21 in Atlanta.

This year's forecast will include a special analysis of how the Gulf War and recession is expected to affect the summer vacation season. This analysis will review consumer's travel attitudes and the impact that the Gulf War had on travel.

Other information will include the most traveled regions in the U.S., the most popular modes of transportation, distance and duration of vacations, accommodation usage, U.S. travel to foreign countries and other forecasts. This year's 10th annual forecast can be purchased through the Data Center after the May 21 news conference in Atlanta. (Full members will receive a complimentary copy).

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel Industry Association of America, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C., 20036-3390. (202) 293-1040.

Dr. Suzanne D. Cook, Executive Director
Scott M. Dring, Editor

TRAVEL PRINTOUT reports on Data Center projects, national travel research conducted by other organizations and trends in the U.S. Travel Industry. Subscriptions are $75 per year; Foreign countries, $80 per year, payable in U.S. funds. ISSN: 0744-6233.

Discoveries...

The World Travel and Tourism Review

World international tourism arrivals is projected to reach a record high in 1990 with more than 415 million arrivals, up 47 percent since 1980, according to CAB International's *World Travel and Tourism Review.*

According to the report, the Americas are a vital region for world tourism, recording one-quarter of the world's international tourism receipts in 1989. North America enjoyed the largest increase in arrivals in the America region in 1989 and accounts for 70 percent of all international arrivals in the region.

Europe boasts 15 percent of the world's population and 36 percent of the world GNP, but garners half of all international tourism receipts, according to the report. Southern Europe and Western Europe each receive 35 percent of all arrivals in the European region. Eastern Europe currently captures 19 percent of arrivals and 2 percent of receipts in the region.

The report says there are dynamic changes that are taking place today in world tourism, but which will be even more evident in the next few years. For example, changes in work habits and changes in working conditions will yield greater leisure time for a greater number of people to participate in tourism and recreation.

The report also predicts that as people become better educated and have greater exposure to other cultures and societies, they will want to visit places about which they have read or heard.

The World Travel and Tourism Review presents statistical data series, forecasts, trends analysis, plus support information on tourism in both the developed and developing world. The 250-page report can be purchased for $170. For more information or to order the publication, contact Carla Long Casler of CAB International in Tucson at (800) 528-4841.

Visitor Volume at National Parks

Region	FEB 1991 visits	% Change from FEB 1990	Year to [illegible] % Change [illegible]
NEW ENGLAND	310,188	14.5*	10.9*
MIDDLE ATLANTIC	1,040,315	20.2	9.1
SOUTH ATLANTIC	3,410,391	-1.4	-4.8
EAST SOUTH CENT.	912,009	6.0	2.1
EAST NORTH CENT.	248,734	11.9	16.2
WEST NORTH CENT.	219,874	18.6	3.5
WEST SOUTH CENT.	484,826	-8.2	-15.0
MOUNTAIN	1,625,220	14.5	6.4
PACIFIC	2,784,850	9.0	6.5
TOTAL	11,036,407	6.4	1.7

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: New England: Conn., Maine, Mass., N.H., R.I., Vermont. Middle Atlantic: N.J., N.Y., Penn. S. Atlantic: Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. East South Central: Ala., Ky., Miss., Tenn. East North Central: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. West South Central: Ark., La., Okla., Texas. Mountain: Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. Pacific: Alaska, Calif., Hawaii, Ore., Wash.

KOA Conducts Gallup Survey

A recent Gallup survey, conducted for Kampgrounds of America (KOA), revealed that nearly one-third of this year's vacationers plan to camp overnight at a campground, park or lake facility and 43 percent of these vacationers plan to camp more in 1991.

"Campsite and cabin reservations are on the upswing compared to a year ago," said Kent Zimmerman, vice president of marketing and franchise services at KOA, in an April news release. "Our campground owners are reporting earlier than usual activity."

All results of the Gallup Travel Expectations Survey are available upon request. For more information, contact Ray Todd of KOA at (406) 248-7444.

To submit your company's travel research projects, send a brief description of the report, including the price, address, and contact name, to Scott Dring, U.S. Travel Data Center, 1133 21st Street, Washington, D.C. 20036.

Data Center Holds Membership, TOF Meetings

The USTDC Membership Committee met on April 1 in Washington to discuss the current status of Data Center membership.

Among the committee's recommendations were the needs of the Data Center to strengthen its marketing programs in the areas of contract research, according to staff liaison Lori Litzenberg.

On March 25, the 1992 USTDC's Travel Outlook Forum Planning Committee gathered in Washington to discuss ideas and make suggestions for the agenda of the 1992 Travel Outlook Forum. The forum will be held October 23, 1991 at the Sheraton Washington Hotel.

The Committee decided to work within the overall theme of the Travel Industry Association's National Conference, "Surviving and Thriving: The New Rules and Realities," to be held following the Travel Outlook Forum on October 24.

Current Travel Indicators - 1990/91

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Feb	$5,359	million	16.4	-1.9	-0.9
Eating and Drinking Places(2)	Mar	$15,555	million	1.4	2.6	2.1
Gasoline Service Stations(2)	Mar	$10,707	million	0.6	7.2	8.1
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Feb	59.9	percent	1.0	-6.4	-4.8
Real Demand for Commercial Lodging(4)	Feb	59.7	million	21.0	-2.2	-0.9
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Mar	27.0	billion	16.4	-8.6	-5.2
Int'l Revenue Passenger-Miles	Mar	7.0	billion	35.6	-19.9	-16.2
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Feb	35.8	billion	-2.6	0.2	-2.1
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Feb	445.2	million	-5.3	8.6	9.2
Travel Price Index (1982 - 84 = 100) (8)	Mar	146.2		0.4	10.1	11.4
U.S. Resident Travel						
Total Person-trips(9)	Dec	93.6	million	-1.1	-13.7	1.1
Vacation Person-trips(9)	Dec	63.2	million	1.8	-19.1	0.6
Total Person-nights(10)	Dec	402.5	million	3.8	n/a	n/a
Vacation Person-nights(10)	Dec	322.3	million	8.1	n/a	n/a
Visitor Volume at National Park Service Areas (11)						
Recreation Visits	Feb	11,036,407		14.6	6.4	1.7
Overnight Stays	Feb	482,732		22.4	4.9	4.2
Foreign Arrivals to the U.S.						
From Overseas(12)	Oct	1,266,441		-7.1	11.0	6.2
From Canada(13)	Feb	992,956		10.3	5.9	2.1
From Mexico(12)	Oct	111,246		10.7	20.9	7.4
U.S. Citizen Departures						
To Overseas(12)	Oct	1,160,700		-14.1	3.3	8.8
	Nov	1,069,800		-7.8	4.2	8.4
To Canada(13)	Feb	469,383		22.9	3.8	-1.0
Domestic Demand for Gasoline						
Barrels/Day(14)	Feb	6,715	thousands	-0.4	-5.8	-2.5

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1988 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy

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TRAVEL PRINTOUT

US Travel Data Center

May 1991 Volume 20, Number 5

Summer Vacations to be Altered

Americans are expected to travel at the same record level recorded last summer, but their vacations will be shorter in duration, involve more stays with friends and relatives and have a stronger emphasis on automobile travel, predicted the U.S. Travel Data Center at a joint news conference with the American Automobile Association on May 21 in Atlanta.

"Americans still want to take their vacation trips this summer despite the current economic conditions," explained Suzanne Cook, executive director of the Data Center, at the Carter Presidential Center. "They will just be altering the characteristics of these trips to fit their current economic situation."

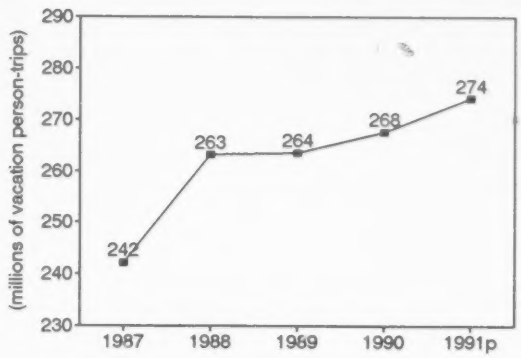
According to the Data Center's *1991 Summer Vacation Travel Forecast*, summer vacation travel in 1991 should be flat or show modest growth as compared to summer 1990, but will at least reach the 326 million vacation person-trips recorded last summer. (A person-trip is one person traveling 100 miles or more away from home).

Vacationers will be taking to the road more than ever this summer. Auto travel will increase its share to 84 percent of all 1991 summer vacation travel, up from 82 percent last summer.

Travel by car, truck and RV is expected to increase 2 percent, up to 274 million person-trips this summer, compared to 268 million in summer 1990.

Summer vacation travelers will be taking shorter trips closer to home and will visit friends and relatives more this summer, according the Data Center. In fact, the duration of an overnight summer vacation trip will drop from 5.1 nights in summer 1990 to 4.9 nights this summer and trips of 1-3 nights will be more popular than ever. Visiting friends and relatives will account for 42 percent of all vacation person-trips this summer.

Summer Vacation Travel by Automobile
Up 13 Percent Since 1987



p=projected

Source: U.S. Travel Data Center

Other highlights from the Summer Forecast include:

- July will be the most popular month for summer travel, with 120 million person-trips.
- Despite rising travel prices in the first quarter of 1991, 56 percent of vacation planners are budgeting the same amount for vacation travel this summer as last summer.
- Consumer studies have indicated that safety concerns have generally subsided and the recession is now the dominant threat to the industry.
- After plummeting last year, the percent of consumers who perceive travel-related goods and services as bargains for summer 1991 compared to summer 1990 has increased.
- Trips of one to three nights will account for more than half of all vacation travel this summer.
- Ocean/beaches (30 percent) are by far the most popular intended type of destination for summer 1991. In addition, the gap between visiting cities and ocean/beaches has widened, compared to last year.
- The Southeast will remain as the most popular vacation destination region this summer, attracting 29 percent of all vacation travel.

(See more summer projections on page 3.)

Airline Fares, Lodging Costs Leads to Travel Price Decrease

The cost of travel in the United States decreased in April for the first time since September 1990, dropping 1.5 percent below the previous month. The decrease was largely due to the 6 percent drop in airline fares and more than 3 percent decrease in lodging prices, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. decreased to 144.0 (1982 - 84 = 100) during April.

For comparison, the overall cost of goods and services Americans purchased as measured by the Consumer Price Index (CPI) increased 0.1 percent in April and rose to 135.2.

Travel Price Index and Components

April 1991 TPI Component	Monthly % Change Mar. 1991 to Apr. 1991	Annual % Change Apr. 1990 to Apr. 1991
Transportation	-1.6	5.2
Airline Fares	-6.2	5.2
Other Intercity Trans.	-0.1	3.4
Intracity Public Trans.	0.4	4.3
Motor Fuel	1.6	5.4
Lodging	-3.5	17.5
Food and Beverages Away From Home	0.4	3.7
Entertainment	1.5	5.1
TRAVEL PRICE INDEX	-1.5	8.2
CONSUMER PRICE INDEX	0.1	4.9

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

The 6.2 percent monthly decrease in airline fares this past April was the largest decrease in airline fares since June 1984. Even though airline fares decreased in April, they were up more than 5 percent as compared to 12 months before.

Overall transportation costs decreased for the fourth consecutive month, dropping 1.6 percent in April. But over the last 12 months, transportation prices have increased more than 5 percent. Lodging prices showed a monthly decrease of 3.5 percent in April, but also showed a substantial increase over the past 12 months.

Motor fuel showed an increase of 1.6 percent, while intracity public transportation, and food and beverages away from home showed slight increases. In addition, entertainment prices increased 1.5 percent in April.

Over the past 12 months, the TPI increased 8.2 percent, influenced greatly by rising lodging and transportation costs. The CPI rose nearly 5 percent over the same 12 month period.

The TPI indicates price changes in travel goods and services available to consumers in the U.S., based on Consumer Price Index data, and does *not* necessarily represent changes in the average fares, rates and other costs that travelers actually paid.

Japanese Overseas Travel Continues to Increase

Nearly 11 million Japanese traveled overseas in 1990, an increase of 122 percent since 1985, according to the Marketing Intelligence Corporation's *Japanese Overseas Travelers' Index (JOTI).*

Twenty-two percent of all Japanese travelers went to Eastern Asia in 1990, 18 percent traveled to Europe/USSR and 8 percent traveled to the United States.

Traveling in a tour booked through a travel agent was the most frequently used method of travel among Japanese traveling overseas. Fifty percent traveled on a tour in 1990, whereas 43 percent traveled independently.

Shopping was the most popular activity for Japanese travelers. Athletics, visiting tourist spots and museums were also popular activities for the Japanese. In fact, tourist spots and athletics have both shown consistent increases in popularity since 1987.

The 1990 survey was conducted among 9,000 Japanese travelers having just returned home from overseas. *JOTI* was established in 1987 and is subscribed to by a number of major organizations around the World. For additional information contact Bill Lewellen at (314) 827-2325.

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(Continued from page 1)

- The West will continue to be the second most popular destination, attracting 20 percent of all vacation travel.
- According to Smith Travel Research, the summer will be sluggish for the hotel industry with occupancy rates dipping below last summer's level. Hotel demand will also be down from last summer.
- More than half (54 percent) of summer 1990 vacation planners say they will visit the same destination this summer, compared to just 43 percent last year.
- Supporting the trend toward shorter trips, a much higher percentage of consumers said they took a mix of long and short trips in summer 1990 than has been reported in previous summers.
- Being together as a family, getting away from the daily work routine and finding rest and relaxation are the top three reasons for Americans to take a summer vacation trip.
- U.S. outbound international travel is expected to recover by summer 1991. The European Travel Commission predicts that the number of U.S. travelers to Europe will approach last summers' volume despite first quarter slumps in international air travel.

For additional information, contact the Data Center at (202) 293-1040. *The 1991 Summer Vacation Travel Forecast* is available for $25. (Data Center full members will be receiving a complimentary copy and basic members may purchase the forecast for $20.)

Visitor Volume at National Parks

Region	MAR 1991 visits	% Change from MAR 1990	Year to Date % Change 1991/90*
NEW ENGLAND	418,342	-5.0%	3.3%
MIDDLE ATLANTIC	1,491,420	8.7	2.1
SOUTH ATLANTIC	5,001,053	-0.3	-1.4
EAST SOUTH CENT.	1,284,731	0.5	0.2
EAST NORTH CENT.	274,534	4.9	11.8
WEST NORTH CENT.	436,347	11.6	5.2
WEST SOUTH CENT.	775,943	-1.3	-8.9
MOUNTAIN	2,027,912	-11.3	-1.3
PACIFIC	2,965,790	-3.3	2.9
TOTAL	14,676,072	-1.5	0.2

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: New England: Conn., Maine, Mass., N.H., R.I., Vermont. Middle Atlantic: N.J., N.Y., Penn. S. Atlantic: Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. East South Central: Ala., Ky., Miss., Tenn. East North Central: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. West South Central: Ark., La., Okla., Texas. Mountain: Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. Pacific: Alaska, Calif., Hawaii, Ore., Wash.

Discoveries...

International Visitors to Increase Spending

The United States Travel and Tourism Administration (USTTA) recently released projections that indicate that the U.S. will receive $56.9 billion in international travel receipts from an estimated 41.5 million visitors in 1991, a 7 percent increase over the previous year.

"This year should set a new record for international inbound travel to the United States," said Harvey Shields, USTTA research director.

Canada is projected to show the largest increase of arrivals to the U.S., jumping 9 percent to more than 18.8 million visitors in 1991.

Of the more than 15 million overseas visitors projected to arrive to the U.S. in 1991, Europe will provide the greatest number of visitors. More than 6.8 million Europeans will travel to the U.S. in 1991, an increase of 4 percent.

South America and Oceania are projected to show the largest increases in arrivals to the U.S. in 1991, jumping 8 percent and 7 percent, respectively.

There were a total of 38.8 million visitors to the U.S. in 1990, spending more than $51.1 billion on tourism goods and services.

On the other hand, Americans traveling abroad in 1990 spent $47.9 billion giving the United States a record travel account surplus of $3.2 billion, compared to a surplus of $1 billion in 1989.

The USTTA also estimated that 4.8 million overseas visitors traveled to California in 1990 and 4.5 million visited New York. Florida, Hawaii and Nevada rounded out the top five destinations.

In addition, several states showed substantial increases in overseas arrivals since 1985. In fact, overseas arrivals to Kansas increased 213 percent since 1985.

This type of information is contained in USTTA *Updates and Information Alerts* quarterly mailings, which can be purchased through the Data Center for an annual subscription rate of $50. For additional information, contact the Data Center at (202) 293-1040.

Current Travel Indicators - 1990/91

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Mar	$5,513	million	2.9	-3.4	-1.9
Eating and Drinking Places(2)	Apr	$15,696	million	0.5	3.9	2.6
Gasoline Service Stations(2)	Apr	$10,403	million	-2.8	5.5	7.5
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Mar	59.8	percent	-0.1	-3.9	-5.3
Real Demand for Commercial Lodging(4)	Mar	64.1	million	7.4	-3.6	-2.4
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Apr	27.2	billion	1.0	-2.0	-4.4
Int'l Revenue Passenger-Miles	Apr	7.7	billion	10.9	-11.1	-14.8
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Mar	43.3	billion	20.8	-0.6	-1.5
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Mar	563.6	million	26.6	3.8	7.1
Travel Price Index (1982 - 84 = 100) (8)	Apr	144.0		-1.5	8.2	10.6
U.S. Resident Travel						
Total Person-trips(9)	Dec	93.6	million	-1.1	-13.7	1.1
Vacation Person-trips(9)	Dec	63.2	million	1.8	-19.1	0.6
Total Person-nights(10)	Dec	402.5	million	3.8	n/a	n/a
Vacation Person-nights(10)	Dec	322.3	million	8.1	n/a	n/a
Visitor Volume at National Park Service Areas (11)						
Recreation Visits	Mar	14,676,072		33.0	-1.5	0.2
Overnight Stays	Mar	687,885		42.5	-2.0	1.4
Foreign Arrivals to the U.S.						
From Overseas(12)	Nov	N/A				
From Canada(13)	Mar	1,662,153		67.4	12.1	6.3
From Mexico(12)	Nov	N/A				
U.S. Citizen Departures						
To Overseas(12)	Dec	1,262,000		18.0	3.6	8.0
To Canada(13)	Mar	593,805		26.5	5.1	1.4
Domestic Demand for Gasoline						
Barrels/Day(14)	Mar	7,016	thousands	309.0	-4.2	-2.7

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1988 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

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US Travel Data Center

June 1991 **Volume 20, Number 6**

Travel & Tourism Continues Economic Growth

Five states and the District of Columbia posted double-digit increases in domestic travel spending during 1989, while an additional 26 states grew faster than the national average of 5.5 percent, according to the U.S. Travel Data Center's *Impact of Travel on State Economies, 1989.*

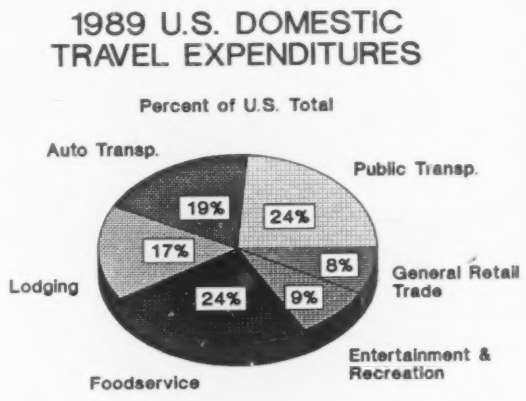
The report is based on the Data Center's newly revised Travel Economic Impact Model (TEIM), which is the only national model which produces the economic impact of travel and tourism at the national, state and local levels.

Domestic travel spending, both direct and indirect, in the U.S. totaled $632.4 billion in 1989. Of this amount, $272 billion were spent directly by Americans traveling 100 miles or more away from home or on trips 50 miles or more away from home which included use of paid accommodations, an increase of 5.5 percent over the previous year. According to preliminary estimates, American spending increased another 6 percent to $288 billion in 1990.

The United States Travel and Tourism Administration (USTTA) reports that foreign visitors spent a record $34.7 billion on travel in the United States in 1989. (Not including passenger fares.) The increase, 19.7 percent over the previous year, was primarily due to the weakening U.S. dollar in terms of major foreign currencies and relatively moderate gains in worldwide economies. Preliminary estimates in 1990 suggested that spending increased another 17 percent to $40.6 billion.

California led all states in direct travel spending with $38.2 billion during 1989. Florida and New York followed with $24.4 billion and $18.3 billion, respectively. Among the 45 states that showed increases in travel spending in 1989, Alabama experienced the largest gain of any state, increasing nearly 13 percent.

Domestic travel spending by U.S. residents directly generated nearly $70 billion in wage and salary, or payroll, income during 1989, an increase of 5.7 percent over 1988. The public transportation category accounted for about 34 percent of the total U.S. travel-generated payroll, followed by foodservice, 21 percent and lodging, 17 percent.



Source: U.S. Travel Data Center

Foreign visitors in the United States generated $9.6 billion in U.S. payroll in 1989. U.S. wage and salary income directly generated by spending of all travelers in the United States, therefore, reached $79.4 billion in 1989, a 7.1 percent increase over the previous year. The average state benefitted from nearly $1.4 billion in U.S. travel-generated wage and salary income.

There were 21 states that received more than $1 billion in travel-generated payroll in 1989. California led all states with $9.5 billion, followed by Florida with $5.6 billion. In 1989, travel expenditures in the U.S. directly generated 5.7 million jobs for Americans residents. U.S. resident travel directly produced 4.9 million jobs. Foreign visitors generated another 760.7 thousand jobs within the U.S. in 1989.

U.S. travelers directly generated over $36 billion in tax revenue during 1989, an increase of more than 5 percent over the previous year. In addition, the Data Center estimates that total tax revenue generated by foreign visitor spending in the U.S. was approximately $4.8 billion in 1989 for an overall total of $41.2 billion.

(Continued on Page 3.)

Cost of Travel Decreases for Second Consecutive Month

The cost of travel in the United States decreased for the second consecutive month this past May, dropping 0.3 percent. The decrease was largely due to the 3 percent drop in lodging prices and a 1 percent decrease in airline fares, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. decreased to 143.6 (1982 - 84 = 100) during May.

For comparison, the overall cost of goods and services Americans purchased as measured by the Consumer Price Index (CPI) increased 0.3 percent in May and rose to 135.6.

Travel Price Index and Components

May 1991 TPI Component	Monthly % Change Apr. 1991 to May 1991	Annual % Change May 1990 to May 1991
Transportation	3.0	7.3
Airline Fares	-1.3	3.3
Other Intercity Trans.	1.0	4.4
Intracity Public Trans.	0.2	4.2
Motor Fuel	6.1	10.3
Lodging	-3.9	16.1
Food and Beverages Away From Home	0.3	3.6
Entertainment	1.0	6.0
TRAVEL PRICE INDEX	-0.3	8.0
CONSUMER PRICE INDEX	0.3	5.0

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

The 1.3 percent decrease in airline fares this past May was the third straight month in which fares showed a decrease. Even though airline fares decreased in May, they were still 3 percent higher than 12 months before.

Overall transportation costs showed an increase of 3 percent in May and during the last 12 months, transportation prices increased more than 5 percent.

Lodging prices showed a decrease for the second consecutive month, but also showed a substantial increase over the past 12 months.

Motor fuel showed an increase of 6.1 percent for the month, while intracity public transportation, and food and beverages away from home showed slight increases. In addition, entertainment prices rose 1 percent in May.

Over the past 12 months, the TPI increased 8 percent, influenced greatly by the rising lodging and motor fuel costs. The CPI rose 5 percent over the same 12 month period.

The TPI indicates price changes in travel goods and services available to consumers in the U.S. and does not necessarily represent changes in the average fares, rates and other costs that travelers actually paid.

Bed & Breakfasts Continue Popularity, Study Says

Overall occupancy at Bed & Breakfasts have increased 7 percent since 1986, with an occupancy rate of 57 percent in 1989, according to *The 1990 Bed & Breakfast/Country Inn Industry Study.*

The study, released by the Professional Association of Innkeepers International, showed the Midwest and South as having the greatest occupancy increases, jumping from 38 percent in 1986 to 45 percent in 1989.

The average rate of a room in 1990 was $106, up from an average of $78 in 1986. According to the report, room rates in the Midwest and South are $8-$20 lower than rates in the Northeast and West.

Breakfasts have become more ample since 1988, with 80 percent of all inns serving cheese, an egg dish or meat on a daily basis compared to 76 percent in 1988. The larger the inn, the more likely it is to have a television and other extra amenities.

Forty-three percent of B&B's business in 1989 was the result of referrals from former guests and returning guests. Books and travel guides and advertising were also popular means of marketing B&B's.

The 1990 Bed & Breakfast/Country Inn Industry Study details financial, and operational details on occupancy, pricing, staff, expenses, rate of return, promotion effectiveness and much more. The complete study costs $125. Regional break-downs are also available for $65 each. For additional information contact the Pat Hardy of the Professional Association of Innkeepers International at (805) 965-0707.

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(Continued from Page 1.)

California led all states with a total of $4.9 billion in travel-generated tax collections. Florida was second with nearly $3 billion and New York was third with $2.9 billion.

The U.S. Travel Data Center developed the TEIM in 1975 to generate detailed, consistent estimates of the impact of U.S. domestic travel spending on national, state and local economies. It is a disaggregated economic model that estimates U.S. resident spending for 14 categories of goods and services provided by 15 types of businesses. The impact of these expenditures on employment, personal income and tax revenue is simulated in the model as well.

The completed revision of the TEIM marks the end of a 20-month project that included extensive consulting with a technical review panel comprised of travel industry authorities. The revised model will have greater accuracy, stability and flexibility.

The Impact of Travel on State Economies, 1989 is an 85-page report of the travel industry's contribution to each state's employment, income and tax revenue and detailing changes in economic impact by state and major industry component.

The report is available for $70 and can be purchased by contacting the Data Center at (202) 293-1040. *(Data Center members will be receiving a complimentary copy.)*

Visitor Volume at National Parks

Region	APR 1991 visits*	% Change from APR 1990	Year to Date % Change 1991/90*
NEW ENGLAND	912,887	-8.8%	-2.8%
MIDDLE ATLANTIC	2,013,480	-3.8	-0.1
SOUTH ATLANTIC	6,978,824	-4.6	-2.7
EAST SOUTH CENT.	1,561,261	2.7	1.0
EAST NORTH CENT.	388,878	-6.5	4.9
WEST NORTH CENT.	622,242	3.4	4.7
WEST SOUTH CENT.	952,644	-2.5	-6.6
MOUNTAIN	3,554,327	-12.7	-5.5
PACIFIC	3,569,395	-6.6	-0.2
TOTAL	19,553,938	-5.4	-1.9

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: New England: Conn., Maine, Mass., N.H., R.I., Vermont. Middle Atlantic: N.J., N.Y., Penn. S. Atlantic: Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. East South Central: Ala., Ky., Miss., Tenn. East North Central: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. West South Central: Ark., La., Okla., Texas. Mountain: Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. Pacific: Alaska, Calif., Hawaii, Ore., Wash.

Vacations Focus on Being Together as a Family

The official start of the most traveled season of the year brings a variety of travel activities, such as sunbathing, swimming and relaxation. But the most important reason for Americans to take a 1991 summer vacation trip is "being together as a family," according to a recent survey conducted by the U.S. Travel Data Center.

Three-quarters, 75 percent, of all Americans who plan to take a 1991 summer vacation trip ranked "being together as a family" as a very important reason to take a summer vacation trip, according to the Data Center's *Summer Intention's Survey.*

In addition, at least 70 percent ranked "getting away from the daily work routine" or "finding rest and relaxation" as very important reasons. The Data Center's *Summer Intention's Survey* interviewed 3,000 U.S. adults on past and planned travel-related activities and attitudes toward vacation travel.

"The need to relax with the family and get away from the daily work routine seems to outweigh the possible economic restraints when taking a vacation trip this summer," said Suzanne Cook, executive director of the Data Center. According to the Data Center's *Summer Vacation Travel Forecast*, American summer vacations should at least reach last summer's record of 326 million person-trips. (A person-trip is one person traveling 100 miles or more away from home.)

Vacation planners were less likely to say that "pampering and indulging in luxury," "getting away from the demands of home," and "being physically active," are very or somewhat important to them as a reason to take a vacation trip.

Nevertheless, more than 40 percent said "getting away from the demands of home" was a very important reason to take a summer vacation trip, while 38 percent said being "physically active," and 29 percent said that "pampering themselves and indulging in luxury" were very important. This suggests there are sizeable markets for those suppliers who can offer these types of vacation benefits.

For additional information, contact the Data Center at (202) 293-1040. *The 1991 Summer Vacation Travel Forecast* is available for $25. (Data Center full members will be receiving a complimentary copy and basic members may purchase the forecast for $20.)

Current Travel Indicators - 1990/91

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Apr	$5,639	million	2.3	4.1	-0.3
Eating and Drinking Places(2)	May	$15,034	million	-2.4	-0.9	1.4
Gasoline Service Stations(2)	May	$10,573	million	1.4	6.2	7.3
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Apr	62.0	percent	3.7	1.9	-5.7
Real Demand for Commercial Lodging(4)	Apr	65.5	million	2.2	2.4	-1.1
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	May	27.5	billion	1.2	-0.5	-2.3
Int'l Revenue Passenger-Miles	May	9.6	billion	23.9	0.9	11.8
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Apr	43.0	billion	-0.4	-0.8	-1.3
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Apr	484.1	million	-14.1	-10.9	2.0
Travel Price Index (1982 - 84 = 100) (8)	May	143.6		-0.3	8.0	10.1
U.S. Resident Travel						
Total Person-trips(9)	Dec	93.6	million	-1.1	-13.7	1.1
Vacation Person-trips(9)	Dec	63.2	million	1.8	-19.1	0.6
Total Person-nights(10)	Dec	402.5	million	3.8	n/a	n/a
Vacation Person-nights(10)	Dec	322.3	million	8.1	n/a	n/a
Visitor Volume at National Park Service Areas (11)						
Recreation Visits	Apr	19,553,938		33.2	-5.4	-1.9
Overnight Stays	Apr	964,920		40.3	-8.8	-2.8
Foreign Arrivals to the U S.						
From Overseas(12)	Nov	N/A				
From Canada(13)	Apr	1,531,000		-7.9	4.6	5.8
From Mexico(12)	Nov	N/A				
U.S. Citizen Departures						
To Overseas(12)	Dec	1,262,000		18.0	3.6	8.0
To Canada(13)	Apr	593,660		-0.1	-1.6	-2.7
Domestic Demand for Gasoline						
Barrels/Day(14)	Apr	7,044	thousands	-0.1	-1.0	-2.1

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted. 1988 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary. U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

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Research News for the U.S. Travel Industry

Research News for the U.S. Travel Industry

TRAVEL PRINTOUT

US Travel Data Center

July 1991 Volume 20, Number 7

U.S. Travel Endures Recession, Gulf Crisis

The Persian Gulf crisis and recession of 1990 did not prevent travel in the United States from increasing for the sixth consecutive year, according to the Data Center's *1990 Travel Market Report*. Americans took 1.27 billion person-trips last year, a 1 percent increase over 1989. (A person-trip is one person traveling 100 miles or more away from home.)

The United States economy experienced sluggish growth throughout 1990. Real GNP barely grew at 0.9 percent for the year, compared to 3 percent in 1989, and payroll employment inched forward at 1.8 percent.

In the last three months of 1990, the state of the economy had a substantial impact on the volume of travel in the United States.

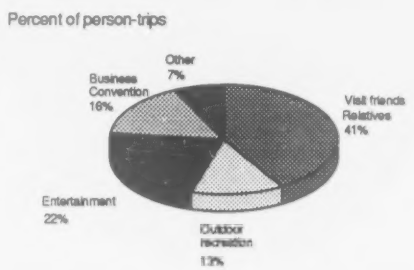
"Even though travel did decline in the last quarter of 1990, the overall volume of travel still showed a 1 percent increase over 1989," said Suzanne Cook, executive director of the Data Center.

The last economic recession in the United States occurred in 1981-82 and had a substantial impact on the travel industry. According to the Data Center's National Travel Survey, the number of person-trips decreased 7 percent in 1982 and did not begin to show an increase until 1985.

The current recession and crisis, however, did affect travelers' transportation habits in 1990. Auto/truck/RV travel rose nearly 3 percent during the year, while air travel fell slightly during 1990. The average duration among auto travelers was equal to 1989, 4 nights, and the average duration among air travelers was slightly longer than a year ago, 6.6 nights.

Auto travelers chose both homes of friends and relatives, 42 percent, and hotels/motels, 40 percent, as their preferred lodging type. Eighty percent of auto trips were for pleasure purposes and 51 percent were taken over a weekend.

PURPOSE OF TRIP, 1990



Source: U.S. Travel Data Center's National Travel Survey

Vacation travel remained stable in 1990, compared to a 6 percent increase in 1989. The duration of vacation travel continued to decline as the average length of stay in 1990 was 4.6 nights. The average round-trip distance also declined, down to 880 miles in 1990 from 940 in 1989.

The Data Center's *Summer Vacation Travel Forecast* indicates that the economy is the overlying factor to the altering of consumer's travel habits, such as shorter duration and distance travel. "Americans still want to travel despite the present economic conditions," said Cook at a news conference in Atlanta. "They will just be changing the way they traveled in the past."

Use of commercial lodging increased slightly during 1990, as more than 310 million trips involved a hotel/motel stay. Forty-seven percent of all U.S. resident trips taken in 1990 included use of such accommodations.

As in previous years, hotel patrons traveled most often by auto, 68 percent. The South Atlantic was the most popular destination region for hotel patrons during 1990.

The South Atlantic again dominated as the most popular destination region in 1990, receiving more than 268 million person-trips.

Among the information contained in *The 1990 Travel Market Report* are statistics on auto and air travel, hotel/motel use, travel by various age groups and a breakdown of vacation, pleasure, weekend and business travel in the United States.

The statistics come from the Data Center's National Travel Survey, a monthly telephone survey of 1,500 U.S. adults. The report can be purchased for $165 by contacting the Data Center at (202) 293-1040. *(Data Center members will be receiving a complimentary copy.)*

Cost of Travel Increases Slightly in June

The cost of travel in the United States increased 0.7 percent this past June, after decreasing in April and May. The increase was largely due to a nearly 2 percent jump in lodging prices, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. increased to 144.6 (1982 - 84 = 100) during June.

For comparison, the overall cost of goods and services Americans purchase, as measured by the Consumer Price Index (CPI), increased 0.3 percent in June and rose to 135.0.

Travel Price Index and Components

June 1991 TPI Component	Monthly % Change May 1991 to June 1991	Annual % Change June 1990 to June 1991
Transportation	-0.6	5.1
Airline Fares	0.6	3.5
Other Intercity Trans.	0.3	3.9
Intracity Public Trans.	-0.1	3.6
Motor Fuel	-1.5	6.2
Lodging	1.9	17.0
Food and Beverages Away From Home	0.3	3.6
Entertainment	0.6	6.3
TRAVEL PRICE INDEX	0.7	8.0
CONSUMER PRICE INDEX	0.3	4.7

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

Airline fares increased 0.6 percent in June, this after three consecutive months in which airline fares decreased. In the last 12 months, airline fares increased 3.5 percent.

Overall transportation costs decreased for the first time since April, dropping nearly 1 percent. Even though transportation costs showed a decrease in June, costs increased more than 5 percent in the last 12 months.

Motor fuel showed a decrease in June after increasing 6.1 percent last month. The 1.5 percent decrease in motor fuel was its first decline since March. Over the last 12 months, however, motor fuel costs have increased more than 6 percent.

Entertainment costs increased slightly in June, rising less than 1 percent.

Over the past 12 months, the TPI increased 8 percent, influenced greatly by rising lodging and motor fuel costs. The CPI rose nearly 5 percent over the same 12 month period.

The TPI indicates price changes in travel goods and services available to consumers in the U.S. and does not necessarily represent changes in the average fares, rates and other costs that travelers actually paid.

Seventeen Percent of U.S. Population Rented a Car, Survey Says

Seventeen percent of the U.S. adult population, or 32 million people, have used a rental car in the last 12 months, according to the U.S. Travel Data Center's National Travel Survey.

"The rental car industry is a very important segment of the travel industry," said Suzanne Cook, executive director of the U.S. Travel Data Center. "These results from the National Travel Survey illustrate the Data Center's continued commitment to utilize its resources in tracking the entire travel industry."

According to the Data Center's survey, 53 percent of the 32 million rental car users rented a car once in the last 12 months, 21 percent twice, 13 percent between three and five times and 13 percent more than six times. The Data Center's monthly survey interviews a national probability sample of 1,500 U.S. adults.

The 32 million adults using rental cars were most likely to be male, employed in professional/technical occupations, between the ages of 35 to 44 years old, residents of the West region and with family incomes of at least $40,000 a year.

According to a recent *Auto Rental News Study*, the car rental industry has been growing in recent years. There were 1.1 million rental cars in service in 1990, an increase of 21 percent over 1989 and more than double the number in 1980. In addition, 1990 revenues reached $7.5 billion, nearly tripling since 1980, according to the study.

(Continued on Page 3.)

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel Industry Association of America, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C., 20036. (202) 293-1040.

Dr. Suzanne D. Cook, Executive Director
Scott M. Dring, Editor

TRAVEL PRINTOUT reports on Data Center projects, national travel research conducted by other organizations and trends in the U.S. Travel Industry. Subscriptions are $75 per year; Foreign countries, $80 per year, payable in U.S. funds. ISSN: 0744-6233.

The U.S. Travel Data Center sponsors and conducts the National Travel Survey, a monthly, national telephone survey that measures traveler volume and behavior and available for use for custom research by travel suppliers and other companies. For additional information contact Elizabeth Stewert at (202) 293-1040.

1992 TOF Set for October 23 in Washington

Will there be any lasting effects of the recession and Gulf War on the travel industry in 1992? What segments of the industry will prosper in the coming year? How has the industry fared thus far in 1991 and to what extent will it rebound in 1992?

Travel experts from all major segments of the industry will gather to answer these questions and discuss what lies ahead for the travel industry during the U.S. Travel Data Center's 1992 Travel Outlook Forum, October 23, 1991 at the Sheraton Washington Hotel in Washington. The 17th annual Travel Outlook Forum, co-sponsored by the Travel & Tourism Research Association (TTRA), will examine air and auto travel, lodging trends, inbound and outbound international travel, 1991 domestic travel trends and business and leisure travel.

Highlights from the 1992 forum include a select panel of international travel executives from the United States, Canada and Mexico who will discuss the topic of "open skies" and its potential impact on the U.S. travel industry.

In addition, Dr. Barbara Everitt Bryant, director, Bureau of the Census at the U.S. Department of Commerce, will be the featured luncheon speaker at this year's forum.

Visitor Volume at National Parks

Region	MAY 1991 visits	% Change from MAY 1990	Year to Date % Change 1991/90*
NEW ENGLAND	1,495,774	-1.8%	-1.2%
MIDDLE ATLANTIC	3,042,359	19.7	7.5
SOUTH ATLANTIC	8,080,359	-1.2	-2.0
EAST SOUTH CENT.	1,722,890	9.2	3.1
EAST NORTH CENT.	625,337	17.1	8.9
WEST NORTH CENT.	1,030,304	3.1	4.0
WEST SOUTH CENT.	1,055,579	-4.2	-6.0
MOUNTAIN	4,166,875	2.4	-2.5
PACIFIC	4,079,317	2.0	0.5
TOTAL	25,298,794	3.1	-0.3

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: New England: Conn., Maine, Mass., N.H., R.I., Vermont. Middle Atlantic: N.J., N.Y., Penn. S. Atlantic: Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. East South Central: Ala., Ky., Miss., Tenn. East North Central: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. West South Central: Ark., La., Okla., Texas. Mountain: Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. Pacific: Alaska, Calif., Hawaii, Ore., Wash.

This year's Travel Outlook Forum will also include popular speakers from past forums. Suzanne Cook, executive director at the Data Center will review domestic travel trends in 1991; David Swierenga, assistant vice president, Air Transport Association, will discuss air travel and Randell Smith, president of Smith Travel Research, will address accommodations.

Other keynote speakers for this year's forum will include: Mr. Delos Smith, senior business analyst of The Conference Board, who will discuss the 1992 economic outlook; and Watts Wacker, executive vice president at Yankelovich Clancy Shulman, who will focus on consumer trends and leisure travel.

The 1992 Travel Outlook Forum will be held on October 23 followed by the Travel Industry Association's (TIA) National Conference on October 24 at the Sheraton Washington Hotel in Washington.

Registration for the forum only for TIA/Data Center/TTRA members is $195 (up to Sept. 23), $225 (after Sept. 23); non-members is $220 (up to Sept. 23), $250 (after Sept. 23). The entire two-day forum and conference is $350 for members (up to Sept. 23), $420 (after Sept. 23); non-members is $400 (up to Sept. 23), $470 (after Sept. 23).

For additional information or to register for the forum and conference, call (202) 293-1040.

Discoveries...

Despite the common belief that mature adults prefer to spend time with people their own age, a new study released by the National Tour Association reveals that 7 out of 10 individuals are interested in traveling with people of different generations.

"The National Tour Association Study of Mature Adult Lifestyles and Attitudes" is based on a random sample survey of more than 800 people 50 years of age and older in the U.S and Canada.

The study also revealed that 94 percent of the mature adult population in North America is concerned about protecting the environment. Sixty percent would be more likely to take an escorted tour if it were environmentally safe and more than 1 in 3 also said they would be willing to pay an additional charge for such a tour.

The National Tour Association is the primary group travel industry organization in North America and has been a leader in identifying travel trends and attitudes of mature adults. For more information about NTA and this study, call 1-800-755-TOUR.

Current Travel Indicators - 1990/91

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	May	$5,599	million	-0.7	2.4	0.2
Eating and Drinking Places(2)	June	$15,584	million	-0.8	2.0	2.5
Gasoline Service Stations(2)	June	$10,724	million	0.5	6.6	7.4
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	May	62.2	percent	0.3	-4.1	-5.4
Real Demand for Commercial Lodging(4)	Apr	65.7	million	0.3	1.0	-0.6
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	June	29.3	billion	6.5	0.8	-1.7
Int'l Revenue Passenger-Miles	May	9.6	billion	23.9	0.9	-11.8
	June	11.2	billion	16.7	-0.6	-9.4
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	May	47.1	billion	9.1	1.0	-0.8
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	May	541.8	million	11.9	5.6	2.8
Travel Price Index (1982 - 84 = 100) (8)	June	144.6		0.7	8.0	9.7
Visitor Volume at National Park Service Areas (11)						
Recreation Visits	May	25,298,794		29.4	7.5	-0.3
Overnight Stays	May	1,609,847		66.8	6.6	0.7
Foreign Arrivals to the U.S.						
From Overseas(12)	Nov	N/A				
From Canada(13)	May	1,456,304		-4.8	13.1	7.3
From Mexico(12)	Nov	N/A				
U.S. Citizen Departures						
To Overseas(12)	Dec	1,262,000		18.0	3.6	8.0
To Canada(13)	May	1,055,241		77.8	1.8	-1.4
Domestic Demand for Gasoline						
Barrels/Day(14)	May	7,179	thousands	0.6	-1.7	-1.8

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted. 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary. U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary. Source: U.S. Department of Energy.

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TRAVEL PRINTOUT

US Travel Data Center

August 1991 Volume 20, Number 8

Travel Outlook Forum to Discuss "Open Skies"

Recent talks between the United States and Canada have again peaked interest in the issue of "open skies," which would enable Canadian airlines to operate within the United States and U.S. carriers to operate within Canada.

A select panel of international executives will be discussing the potential impact of an "open skies" agreement at the U.S. Travel Data Center's 1992 Travel Outlook Forum, to be held on October 23, 1991 at the Sheraton Washington Hotel in Washington.

The United States initially started to negotiate more liberal air transportation agreements with foreign countries in the late 70s, but it has been a very slow process.

"The concept of 'open skies' is more of a principle or objective," said Jean O'Brien, deputy director, Office of Policy and Planning at the United States Travel and Tourism Administration (USTTA). "In principle, a carrier will pick up the markets that they want to enter, determined by the marketplace and not the government, with the freedom to exit the market."

The goal of an "open skies" aviation policy is to negotiate competitive air transportation networks with trading partners that respond to market demands and opportunities, according to the USTTA.

The United States has tabled "open skies" proposals with Canada, France, Germany and the United Kingdom, but recent talks have again surfaced with Canada. An "open skies" agreement with Canada would help close the gap between consumer demand and supply in the U.S. - Canadian market, the largest gap of any other bilateral market.

Talks between the U.S. and Canada began in late April this year and several others are scheduled in the coming months. "The United States and Canada are negotiating to remove all economic barriers that will prohibit open skies," said Susan McDermott, assistant director for negotiations in the Office of International Aviation. "There is a broad agreement in principle of open skies between both countries, it is just the matter of how it will be accomplished."

"The talks are very much in the preliminary stages, but they are proceeding in a positive manner," said Blair F. Stevens, director general, Research, Tourism Canada.

The agreement will enable the United States to become stronger and more competitive in the international market. The concept is very beneficial to everyone involved, increasing the ability to attract foreign visitors to each respective country.

The current U.S. - Mexican civil aviation agreement is one of the most successful U.S. air transportation agreements and is strong evidence that an open skies relationship can be beneficial to both countries. The liberalized agreement has greatly benefitted Mexico and expanded air service to many cities in both countries by new carriers.

The panel of international travel executives who will discuss the topic of "open skies" and its potential impact on the U.S. travel industry will include; Harvey Shields, director, Office of Research at the USTTA; Blair F. Stevens, director general, Research, Tourism Canada; and Mario Di Constanza, economic studies, Mexico Secretaria de Turismo.

The 1992 Travel Outlook Forum will be held on October 23, 1991 followed by the Travel Industry Association's (TIA) National Conference on October 24 at the Sheraton Washington Hotel in Washington.

The 17th annual Travel Outlook Forum, co-sponsored by the Travel & Tourism Research Association (TTRA), will examine air and auto travel, lodging trends, inbound and outbound international travel, 1991 domestic travel trends and business and leisure travel.

In addition, Dr. Barbara Everitt Bryant, director, Bureau of the Census at the U.S. Department of Commerce, will be the featured luncheon speaker at this year's forum.

Registration for the forum only for TIA/Data Center/TTRA members is $195 (up to Sept. 23), $225 (after Sept. 23); non-members is $220 (up to Sept. 23), $250 (after Sept. 23). The entire two-day forum and conference is $350 for members (up to Sept. 23), $420 (after Sept. 23); non-members is $400 (up to Sept. 23), $470 (after Sept. 23).

For additional information or to register for the forum and conference, call (202) 293-1040.

INSIDE: Results from the 1991 Membership Survey and winner of the free registration to the Travel Outlook Forum

Cost of Travel Increases 1.4 Percent in July

The cost of travel in the United States increased for the second consecutive month in July. The cost of travel in July increased 1.4 percent over the previous month and increased 6.6 percent over the past 12 months, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. increased to 146.6 (1982 - 84 = 100) during July.

For comparison, the overall cost of goods and services Americans purchase, as measured by the Consumer Price Index (CPI), increased 0.2 percent in June and rose to 136.2.

Travel Price Index and Components

July 1991 TPI Component	Monthly % Change June 1991 to July 1991	Annual % Change July 1990 to July 1991
Transportation	-1.4	3.8
Airline Fares	-0.3	3.3
Other Intercity Trans.	1.3	4.2
Intracity Public Trans.	0.8	4.1
Motor Fuel	-2.3	4.1
Lodging	4.6	12.9
Food and Beverages Away From Home	0.4	3.6
Entertainment	0.2	5.6
TRAVEL PRICE INDEX	1.4	6.6
CONSUMER PRICE INDEX	0.2	4.5

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

Airline fares decreased 0.3 percent in July, the fourth decrease in the last five months. In the last 12 months, airline fares increased 3.3 percent. Overall transportation costs decreased for the second consecutive month, dropping more than 1 percent. Even though transportation costs showed a decrease in June, costs increased nearly 4 percent in the last 12 months.

Motor fuel showed a decrease in July for the second consecutive month. The 2.3 percent decrease in motor fuel was the largest decrease since March. Over the last 12 months, however, motor fuel costs have increased more than 4 percent.

Entertainment costs increased slightly in June, rising nearly 1 percent, but jumped more than 5 percent over the last 12 months.

Intracity public transportation showed an increase of less than 1 percent this past July.

Over the past 12 months, the TPI increased 6.6 percent, influenced greatly by rising lodging and entertainment costs. The CPI rose nearly 5 percent over the same 12 month period.

The TPI indicates price changes in travel goods and services available to consumers in the U.S. and does not necessarily represent changes in the average fares, rates and other costs that travelers actually paid.

U.S. Travel Decreases in First Quarter 1991

The volume of travel in the first quarter 1991 showed a slight decrease from the first quarter in 1990, according to preliminary numbers from the Data Center's National Travel Survey.

"The euphoria of U.S. residents after the conclusion of the Gulf War helped increase travel in March, but declines in January and February attributed to a slight decrease in the first quarter of 1991," said Elizabeth Stewart, manager of market research at the Data Center.

There were a total of 238.9 million person-trips in the first quarter of 1991, which includes January, February and March. The 1991 total was a decrease of 0.1 percent over the first quarter of 1990. (A person-trip is one person traveling 100 miles or more away from home.)

The number of trips taken in the first quarter of this year decreased nearly 3 percent. There were a total of 124.2 million trips in the first quarter of last year, compared to 120.8 million trips this year.

There were fewer trips being taken, but more people were on the road compared to the first quarter of last year, according to Stewart.

Preliminary numbers from the Data Center show that travel in April 1991 will show an increase over the previous April. For additional information, contact Elizabeth Stewart at (202) 293-1040.

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel Industry Association of America, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C., 20036. (202) 293-1040.

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Traveler's Demographic Characteristics Remain Stable

In general, travelers demographic characteristics remained stable in 1990, according to the U.S. Travel Data Center's *1990 Travel Market Report.*

Fifty-four percent of 1990 travelers were male, 46 percent female. In addition, 60 percent of all travelers were married with the average age being 41 years old.

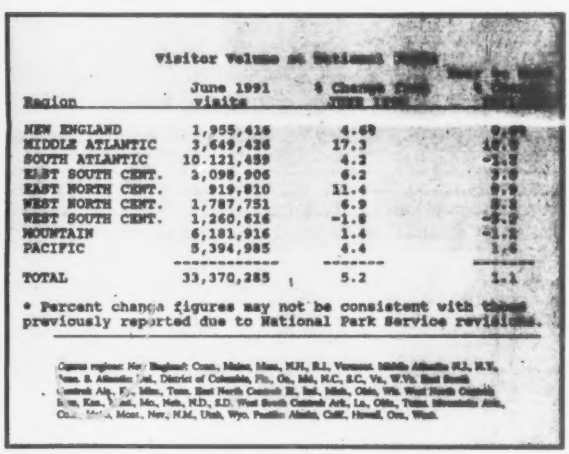
More than half of the travelers held professional/managerial or other white collar jobs, 15 percent were retired, 29 percent had a household income of at least $50,000 and nearly 70 percent of 1990 travelers owned their own homes, according to the report.

Among the information contained in *The 1990 Travel Market Report* are statistics on auto and air travel, hotel/motel use, travel by various age groups and a breakdown of vacation, pleasure, weekend and business travel in the United States.

The statistics come from the Data Center's National Travel Survey, a monthly telephone survey of 1,500 U.S. adults. The report can be purchased for $165 by contacting the Data Center at (202) 293-1040. *(Data Center members will be receiving a complimentary copy.)*

Data Center Announces Survey Results, Prize Winner

The majority of Data Center membership are satisfied with membership services and benefits, but some are still not aware of all services available, according to a recent Data Center membership survey.



Visitor Volume at National Parks

Region	June 1991 visits	% Change June 91	%
NEW ENGLAND	1,955,416	4.69	0.69
MIDDLE ATLANTIC	3,649,426	17.3	10.1
SOUTH ATLANTIC	10.121,459	4.2	-1.2
EAST SOUTH CENT.	3,098,906	6.2	3.8
EAST NORTH CENT.	919,810	11.4	8.9
WEST NORTH CENT.	1,787,751	6.9	2.1
WEST SOUTH CENT.	1,260,616	-1.8	-5.9
MOUNTAIN	6,181,916	1.4	-1.2
PACIFIC	5,394,985	4.4	1.6
TOTAL	33,370,285	5.2	1.1

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: New England: Conn., Maine, Mass., N.H., R.I., Vermont. Middle Atlantic N.J., N.Y., Penn. S. Atlantic: Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. East South Central: Ala., Ky., Miss., Tenn. East North Central: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. West South Central: Ark., La., Okla., Texas. Mountain: Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. Pacific: Alaska, Calif., Hawaii, Ore., Wash.

The survey revealed that Travel Printout, the Outlook for Travel and Tourism and Survey of State Travel Offices were the most widely used publications. In addition, nearly 90 percent of membership were satisfied with Travel Printout.

Several members are not aware of all the services that are available at the Data Center. Forty-six percent were not aware that any organization could add more questions to the National Travel Survey and 43 percent were not aware of member discounts on custom research.

The winner of the free registration to this year's Travel Outlook Forum in Washington was Wally Biermann of the Illinois Department of Commerce and Community Affairs. The Data Center would like to thank all the members for their input and suggestions.

Discoveries...

During the three-month period of the Persian Gulf War, 3.1 percent of the general population and 4 percent of all travelers changed or canceled at least one trip since January 1991, according to the Travel Industry Association's report, Industry in a Crisis: The Impact of the Persian Gulf War on the U.S. Travel Industry.

The benchmark report, conducted by The U.S. Travel Data Center, contains survey information collected during February, March and April 1991, the height of the Persian Gulf crisis. The Data Center interviewed 4,500 U.S. adults during the three-month period.

Despite the uncertain travel atmosphere in March and April, just 11 percent of all travelers said they planned to travel less in the next six months than they did last year, and 22 percent said they planned to travel more.

In addition, only 4 percent of travelers said they would travel less in the six months because of safety reasons. The average safety rating for different types of travel also correspond to actual traffic in the same period of time as indicated by international travel, which registered the lowest average safety rating by those surveyed and also showed the sharpest decline in traffic during the first quarter 1991.

Other highlights from the report include; traveler perceptions, the impact of the crisis on individual segments of the travel industry and a historical analysis on the impact of the 1981-83 recession compared to the impact of the current recession. The report can be purchased for $25 by contacting Kirsten Luescher of TIA at (202) 293-1433.

To submit your company's travel research projects, send a brief description of the report, including the price, address and contact name to: Travel Printout, U.S. Travel Data Center, 1133 21st Street, Washington, D.C., 20036.

Current Travel Indicators - 1990/91

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	June	$6,283	million	12.2	10.0	1.9
Eating and Drinking Places(2)	July	$16,010	million	-0.1	4.7	3.4
Gasoline Service Stations(2)	July	$10,685	million	-0.9	3.2	6.4
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	June	61.7	percent	-0.8	-5.4	-5.4
Real Demand for Commercial Lodging(4)	May	65.7	million	0.3	1.0	-0.6
	June	70.0	million	6.7	0.3	-0.5
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	July	31.3	billion	6.7	-0.6	-1.5
Int'l Revenue Passenger-Miles	July	12.3	billion	9.5	-1.2	-7.9
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	June	48.4	billion	2.8	1.2	-0.4
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	June	577.2	million	6.5	6.2	3.4
Travel Price Index (1982 - 84 = 100) (8)	July	146.6		1.4	6.6	9.2
Visitor Volume at National Park Service Areas (11)						
Recreation Visits	June	33,370,285		31.9	5.2	1.1
Overnight Stays	June	2,703,210		67.9	5.5	2.5
Foreign Arrivals to the U.S.						
From Overseas(12)	Nov	1,120,434		-11.5	16.3	6.9
	Dec	1,329,701		18.6	14.7	7.6
From Canada(13)	June	1,417,635		-2.7	18.5	9.1
From Mexico(12)	Nov	N/A				
U.S. Citizen Departures						
To Overseas(12)	Dec	1,262,000		18.0	3.6	8.0
To Canada(13)	June	1,545,826		46.5	-3.5	-2.1
Domestic Demand for Gasoline						
Barrels/Day(14)	June	7,587	thousands	1.5	0.9	-0.6

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted. 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

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US Travel Data Center

September 1991 Volume 20, Number 9

Woman Business Travelers Increase in 1990

The number of woman business travelers increased to 13.1 million in 1990, according to the U.S. Travel Data Center's *1990 Survey of Business Travelers*. The 8.5 percent increase over 1989 was the first increase in the number of woman business travelers since the survey began in 1986.

The report, which is sponsored by the Official Airline Guides (OAG), said that even though the number of woman business travelers increased, the number of trips they took decreased from 54.3 million trips in 1989 to 44.9 million trips in 1990. While, 37.4 percent of all business travelers are woman, they took just 28.9 percent of all business trips.

A total of 35.1 million U.S. adults took one or more business trips in 1990, a more than 1 percent increase over 1989. At the same time, these travelers took 8.3 percent fewer business trips than in 1989.

"Business travelers consolidated their trips more in 1990 in order to cut expenses," said Elizabeth Stewart, manager of market research at the Data Center.

There are significant differences between men and women who travel on business. The average female business traveler is 40 years old, two years older than her male counterpart. She is twice as likely to be divorced, separated or widowed and somewhat less likely to be a college graduate.

In addition, women business travelers are about as likely as men to be professionals or managers, but they are more likely to have a sales/clerical position. Median household income for woman business travelers is $30,000 - $40,000, while for men it's $40,000 - $50,000.

The majority of woman are "infrequent" business travelers, that is 1 to 2 business trips a year. Men are about twice as likely to take 10 or more trips annually.

Women are far more likely than men to attend a meeting, convention or trade show on a typical business trip. They also combine vacation with business travel slightly more often.

There are no great gender differences in terms of nights per trip, but a slightly larger percentage of men takes extended business trips. Men were also more likely to have visited their most recent destination at least once before during the year.

Women tended to use their own cars as their primary transportation on a typical business trip in 1990, while men were somewhat more likely to use other modes. In addition, women were less likely to stay in a hotel or motel and a little more likely to stay with friends and relatives.

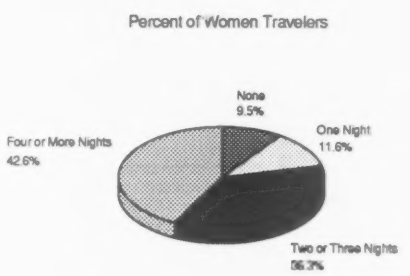
The most popular time of the year for woman business travelers to travel is the summer and autumn. October, June and July are the most popular months for woman business travelers.

The Survey of Business Travelers has tracked the growth characteristics of U.S. business travelers on a monthly and annual basis since 1986.

The SBT includes an overview of business travel, characteristics of business trips, a profile of business travelers, purpose of trips, modes of transportation and accommodations. Segments covered in the report include women business travelers, business car rentals, frequent travelers and airline travelers, among others.

The 1990 Survey of Business Travelers is available for $85 by contacting the Data Center at (202) 293-1040. *(Data Center members will be receiving a complimentary copy.)*

WOMEN BUSINESS TRAVELERS NIGHTS AWAY, 1990



Source: Survey of Business Travelers

INSIDE: 1992 Travel Outlook Forum Final Schedule; International Travel to U.S. Sustains Growth

Cost of Travel Increases Slightly in August

Even though the cost of travel in the United States increased for the third consecutive month in August, no component of the Travel Price Index increased more than 1.4 percent. The cost of travel in August increased 0.8 percent over the previous month and increased 5.0 percent over the past 12 months, according to the Data Center's latest (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. increased to 147.7 (1982 - 84 = 100) during August.

For comparison, the overall cost of goods and services Americans purchase, as measured by the Consumer Price Index (CPI), increased 0.3 percent in June and rose to 136.6.

Travel Price Index and Components

August 1991 TPI Component	Monthly % Change July 1991 to August 1991	Annual % Change August 1990 to August 1991
Transportation	0.9	0.3
Airline Fares	0.9	4.1
Other Intercity Trans.	-0.6	3.3
Intracity Public Trans.	0.1	3.8
Motor Fuel	1.1	-3.8
Lodging	1.4	10.1
Food and Beverages Away From Home	0.2	3.5
Entertainment	0.4	5.9
TRAVEL PRICE INDEX	0.8	5.0
CONSUMER PRICE INDEX	0.3	3.8

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

Airline fares remained relatively stable increasing 0.9 percent in August. In the past 12 months, airline fares increased 4.1 percent. Overall transportation costs increased less than 1 percent in August after decreasing in June and July. Transportation costs increased only 0.3 percent over the past 12 months, the lowest annual percent increase in transportation costs since December 1988.

Motor fuel increased for the first time since May, increasing more than 1 percent. Over the past 12 months, however, motor fuel costs have decreased nearly 4 percent.

Entertainment costs increased in August, rising nearly 1 percent, and jumped more than 5 percent over the past 12 months. Intracity public transportation also showed an increase of less than 1 percent this past August.

The TPI indicates price changes in travel goods and services available to consumers in the U.S. and does not necessarily represent changes in the average fares, rates and other costs that travelers actually paid.

South Atlantic Region Remains Most Popular

The South Atlantic region again dominated as the most popular destination region in 1990, receiving more than 268 million person-trips, according to the Data Center's *1990 National Travel Survey Full-Year Report.*

The South Atlantic, which includes Delaware, District of Columbia, Florida, Georgia, Maryland, North and South Carolina, Virginia and West Virginia, accounted for 21 percent of all person-trips in 1990, while the East North Central was the next most popular region with 14 percent.

In addition, the South Atlantic led in attracting travel from outside its own boundaries, receiving 53.7 million more person-trips than it generated.

As for regions of travel origin, all but three Census Regions generated more travelers in 1990 than in 1989. The East North Central produced the most travelers with more than 222 million.

Among the information contained in the 1990 Travel Market Report are statistics on auto and air travel, hotel/motel use, travel by various age groups and a breakdown of vacation, pleasure, weekend and business travel by residents of the United States.

The statistics come from the Data Center's National Travel Survey, a monthly telephone survey of 1,500 U.S. adults. The report can be purchased for $165 by contacting the Data Center at (202) 293-1040. Proprietary custom questions may be added to the NTS and special tabulations of the data base are also available by contacting Elizabeth Stewart, manager of market research. *(Data Center members will be receiving a complimentary copy.)*

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel Industry Association of America, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C., 20036. (202) 293-1040.

Dr. Suzanne D. Cook, Executive Director
Scott M. Dring, Editor

TRAVEL PRINTOUT reports on Data Center projects, national travel research conducted by other organizations and trends in the U.S. Travel Industry. Subscriptions are $75 per year; Foreign countries, $80 per year, payable in U.S. funds. ISSN: 0744-6233.

European Travel to U.S. Continues Growth

Despite the crisis conditions early in 1991, European travel to the United States showed a moderate increase, according to a United States Travel and Tourism Administration (USTTA) report, which was released at the Travel Industry Association of America's and USTTA's annual Discover America International Pow Wow - Europe.

Travel from Europe to the U.S. increased 3.8 percent during the first four months of the year, compared to 1990, outdistancing most other world markets.

USTTA said that January travel from Europe rose 0.6 percent over 1990, with 365,000 arrivals. Rapid growth was seen from Italy in January with 28,000 Italians traveling to the U.S., a 16 percent increase.

Travel dropped in February by 6.5 percent, because the Gulf War caused "the world to stop traveling."

European travel to the United States rebounded significantly in March, with a 13.6 percent increase. The greatest increases in travel to the U.S. were from: Spain (45.3 percent), Germany (29.8 percent), United Kingdom (17.9 percent) and Switzerland (11.1 percent). In April, travel from the major European markets showed a 3 percent rise over 1990.

Data Center Conducts Conference Survey

The Discover America International Pow Wow, the annual business meeting conducted by the Travel Industry Association of America (TIA) and the United States Travel and Tourism Administration (USTTA), will generate an estimated 9.6 million to 12.3 million international visitors to the United States during 1992 and 1993, according to a survey conducted by the U.S. Travel Data Center.

"The information provided by the Data Center's survey is a valuable resource in evaluating this event that is so important to our membership," said Susan L. Elms, senior vice president of marketing programs at the TIA.

Participants at the conference, held in Denver this past May, rated the overall value of Pow Wow quite favorably. In fact, the vast majority of both U.S. and international delegates (86 percent and 93 percent, respectively) gave the Pow Wow a rating of 4 or 5 on a scale from 1 (no value) to 5 (great value). Average ratings were 4.3 for U.S. delegates and 4.4 for international delegates.

Data Center surveys, such as the one conducted for TIA, are an excellent method of measuring the success of a conference or trade show, as well as assessing the satisfaction of delegates. "The Data Center has substantial experience in conducting evaluation research," said Suzanne D. Cook, executive director of the Data Center. "Such research is vital to the success of an organization operating in today's highly competitive conference market."

For additional information on the Data Center's capabilities in conducting conference research, contact Elizabeth Stewart, manager of market research, at (202) 293-1040.

Don't Forget

The Data Center now provides a free listing of all available publications. This in-depth guide lists all Data Center publications, in addition to reports from the United States Travel and Tourism Administration (USTTA), the European Travel Data Center (ETDC) and the reports from the Discover America 2000 series.

Through an agreement with the USTTA, reports such as the *In-flight Surveys*, the *Pleasure Travel Market to North America* and the *Summary and Analysis of Travel to the United States*, may now be purchased directly through the Data Center.

The publication guide also describes the Discover America 2000 Marketing Research Series. This series includes *Discover America 2000: The Implications of America's Changing Demographics and Attitudes on the U.S. Travel Industry* and the *Discover America 2000: The Mature Market*, commissioned by TIA.

If you would like a complete and free listing of domestic and international travel research reports available from the Data Center, call (202) 293-1040.

Visitor Volume at National Parks

Region	July 1991 visits	% Change from JULY 1990	Year to Date % Change 1991/90*
NEW ENGLAND	2,727,174	1.6%	0.5%
MIDDLE ATLANTIC	4,230,259	4.3	8.5
SOUTH ATLANTIC	11,214,826	0.9	-0.5
EAST SOUTH CENT.	3,422,493	45.2	13.1
EAST NORTH CENT.	1,396,037	12.9	10.4
WEST NORTH CENT.	2,753,166	12.7	8.0
WEST SOUTH CENT.	1,251,898	-1.5	-4.4
MOUNTAIN	8,101,300	8.5	1.6
PACIFIC	6,720,131	3.8	1.1
TOTAL	41,817,284	7.0	2.5

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: New England: Conn., Maine, Mass., N.H., R.I., Vermont. Middle Atlantic: N.J., N.Y., Penn. S. Atlantic: Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. East South Central: Ala., Ky., Miss., Tenn. East North Central: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. West South Central: Ark., La., Okla., Texas. Mountain: Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. Pacific: Alaska, Calif., Hawaii, Ore., Wash.

Current Travel Indicators - 1990/91

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	July	$5,477	million	-12.8	2.7	2.1
Eating and Drinking Places(2)	Aug	$15,996	million	0.8	5.1	3.7
Gasoline Service Stations(2)	Aug	$10,713	million	1.0	-5.3	3.7
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	July	61.4	percent	-0.5	-1.3	-4.9
Real Demand for Commercial Lodging(4)	July	69.1	million	-1.3	3.0	0.1
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Aug	32.7	billion	4.5	-2.5	-3.0
Int'l Revenue Passenger-Miles	Aug	13.5	billion	10.2	3.2	-5.5
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	July	51.6	billion	6.7	1.4	0.3
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	July	604.5	million	4.7	2.5	3.3
Travel Price Index (1982 - 84 = 100) (8)	Aug	147.7		0.7	5.0	8.7
Visitor Volume at National Park Service Areas (11)						
Recreation Visits	July	41,817,284		25.3	7.0	2.5
Overnight Stays	July	3,718,645		37.6	10.5	5.2
Foreign Arrivals to the U.S.						
From Overseas(12)	Jan	1,005,282		-24.4	-0.2	-0.2
	Feb	795,111		-20.9	-14.0	-6.8
	March	1,120,929		40.9	1.1	-3.9
	April	1,123,811		0.3	2.3	-2.2
From Canada(13)	July	2,593,647		82.9	12.9	10.0
From Mexico(12)	Nov	98,133		11.8	12.8	7.8
	Dec	144,009		46.7	9.8	8.0
	Jan	73,033		-49.3	-9.2	-9.2
	Feb	65,508		-10.3	-9.9	-9.5
	March	125,220		91.1	45.8	10.3
	April	94,585		-24.5	-27.7	-3.1
U.S. Citizen Departures						
To Overseas(12)	Jan	N/A				
To Canada(13)	July	2,074,988		34.9	-1.1	-1.8
Domestic Demand for Gasoline						
Barrels/Day(14)	July	7,514	thousands	0.7	0.2	-1.1

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary. Source: U.S. Department of Energy

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